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Criminal Dimensions of Forced Sterilization of Romani Women: A Focus on Gender-Based Violence and Deprivation of Liberty

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Abstract
This paper examines the forced sterilization of Romani women as a serious violation of human rights and a fundamental denial of personal liberty. Drawing on legal, sociological, and feminist frameworks, the analysis demonstrates how this practice reflects intersecting forms of racial and gender-based discrimination within healthcare systems and state institutions. Romani women in vulnerable socio-economic circumstances have been systematically denied autonomy over their reproductive choices, highlighting broader patterns of structural exclusion. The findings emphasize the need to address forced sterilization not only as a criminal offense but also as a form of institutionalized violence that requires urgent legal, policy, and institutional reforms to protect personal liberty and advance reproductive justice.

Keywords
Discrimination; Liberty; Roma; Gender Based Violence; Systemic Racism; Romani Women; Antigypsyism

INTRODUCTION

In 2021, the world woke up to news that captured everyone's attention: Slovakia issued an official apology for the forced sterilization of Romani women.[1] According to the government, these sterilizations took place between 1966 and 1989, intending to limit the number of children born to the Roma minority. This analysis is framed within the broader context of post-socialist legal and political transitions in Central and Eastern Europe. It focuses particularly on the transitional justice processes in countries such as Slovakia and the Czech Republic, covering the period from 1966 (when the forced sterilizations were first documented) to 2023 (the most recent reports by the OSCE and ERRC). The research is situated geographically in jurisdictions where systemic antigypsyism continues to influence public policy and judicial responses. Violations of human rights on this scale deserve the highest condemnation, which should lead not only to compensation for the victims but also to a clear message to the public that such hate crimes will not be tolerated or go unpunished.

In medical terms, sterilization is a surgical intervention that permanently removes an individual's ability to reproduce (Ťápalová 2011, 197-201). Medical experts, along with human

[1]For more information, please visit: https://nezavisen.mk/slovachka-se-izvini-za-prisilnata-sterilizacija-na-zhenite-romki/

rights experts, noted in the manual of the International Federation of Gynecology and Obstetrics that sterilization is never a life-saving operation that should be performed on an emergency basis and without full and informed consent (Figo 2021).

Involuntary sterilization is any sterilization that takes place against the will or without the knowledge of the person concerned, that is, without informed consent. Any person who will undergo this operation should be fully aware of its nature, possible consequences and alternative methods of contraception. If these conditions are not present, sterilization is involuntary. Forced sterilization occurs when a person is sterilized after explicitly refusing the procedure, without their knowledge or when they are not allowed to give informed consent (Coercive and cruel, report by the European Roma Rights Centre 2016).

Gender-based violence and violence against women are terms often used interchangeably, as it is well established that the majority of gender-based violence is inflicted on women and girls. However, the use of the term "gender" is important, as it underscores that many forms of violence against women are rooted in power imbalances between women and men.[2]

LITERATURE REVIEW

The concept of antigypsyism, as defined by Rostas and Kostka (2014), refers to a specific form of racism directed against Roma communities, characterized by systemic discrimination and exclusion. The issue of forced sterilization, particularly as it affects Romani women, has been extensively discussed within the fields of human rights, gender studies, and criminal law. Various scholars have highlighted the complex intersection of race, gender, and ethnicity, which makes Romani women especially vulnerable to reproductive coercion and violence.

This article examines the forced sterilization of Romani women from different angles (legal, historical, gender-based, and human rights perspectives). Throughout history, forced sterilizations have often been justified by medical personnel as necessary for public health. At the beginning of the 20th century, medical personnel claimed that they were needed to solve hereditary and genetic defects. In the late 20th century, forced sterilizations were deemed necessary to address overpopulation (Stern 2005) and in more recent times, these interventions made on Romani women were justified as essential for them, ruthlessly exploiting their vulnerable position in society. Their position as woman in the community made them an easier target for the institutions in carrying out their immoral actions.

The forced sterilization of Romani women represents a clear manifestation of antigypsyism intersecting with gender-based violence, where women are targeted based on both their ethnicity and gender. Scholars such as Poposka and Jovevski (2024) emphasize the need to consider gender-based violence within the broader framework of hate crimes and systemic racism. In exploring this subject, a novel legal perspective is aimed to be introduced by analyzing the forced sterilization of Romani women not only as a human rights violation or form of gender-based violence, but as a hate crime rooted in systemic antigypsyism and racial prejudice.

[2]For more information, visit: https://eige.europa.eu/publications-resources/thesaurus/terms/1113?language_content_entity=en

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METHODOLOGY

This paper employs a qualitative and interdisciplinary approach to analyse the criminal aspects of forced sterilization of Romani women, with a specific focus on gender-based violence (GBV) and deprivation of liberty. The research is guided by the central question: To what extent can the forced sterilization of Romani women be legally qualified as a hate crime and gender-based violence that deprives them of their liberty, considering its systemic, racial, and gendered dimensions?

The main hypotheses developed throughout this paper are as follows:

H1: The practice of forced sterilization of Romani women constitutes a form of hate crime rooted in antigypsyism.

H2: Forced sterilization represents gender-based violence and results in the deprivation of liberty.

H3: Legal frameworks at the European level inadequately address the intersectionality of gender, race, and systemic discrimination.

The research integrates doctrinal legal analysis, literature review, comparative analysis, case law review, and intersectional analysis to provide a comprehensive understanding of the issue. The paper includes a thorough review of academic literature, reports, and legal documents related to forced sterilization, antigypsyism, and gender-based violence, aiming to contextualize the practice within broader patterns of systemic discrimination and human rights violations.

Through legal and comparative analysis, this paper explores the legal framework surrounding these issues within European Union legislation. It also examines key international conventions, including the United Nations Convention on the Elimination of All Forms of Discrimination against Women (CEDAW), the International Covenant on Civil and Political Rights, the Convention on the Rights of Persons with Disabilities, and the Convention against Torture and Other Cruel, Inhuman or Degrading Treatment or Punishment, in order to identify the rights of individuals and the obligations of states in preventing such violations. Furthermore, the study reviews reports from human rights organizations that document incidents of hate crimes, particularly those targeting Romani people. These reports are critically analyzed to identify recurring patterns over the years in specific countries, with a focus on the intensity and nature of these violations.

The paper then conducts a case law review by analyzing the merits of a judgment issued by the European Court of Human Rights, with a particular focus on the landmark ruling in *V.C. v. Slovakia* (2012), which addressed the issue of forced sterilization as a violation of fundamental rights, specifically concerning Romani women. A comprehensive analysis of the case and the Court's judgment is provided, including a focused examination of one of the presiding judges and his individual opinion.

Through this methodology, the paper offers an in-depth legal analysis of forced sterilization, shedding light on the intersection of criminal law, human rights, liberty, and gender-based violence. It concludes by offering recommendations aimed at strengthening legal protections for Romani women and ensuring accountability for acts of forced sterilization.

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DEFINING ANTIGYPSYISM AS A DISTINCT FORM OF RACISM

Antigypsyism is a distinct form of racism directed against individuals who are stigmatized in the social worldview under labels such as "gypsies," "tsigane," "ţigan," "Zigeuner," "Tatars," "zingari," or other related terms, all of which are rooted in assumptions that they belong to an inferior and deviant group. For those reasons, the domination over them and their oppression are justified (Rostas and Kostka 2014, 268-281). According to Rostas and Kostka (2014), manifestations of antigypsyism are visible through these mechanisms:

- The passivity of state institutions in protecting the rights of the Roma often violates the European Convention on Human Rights, regarding the doctrine of positive obligations of the state.
- Lack of information about Roma in regular educational programs.
- Denial of equal protection of Roma before the law.
- Ignorance of the Roma history of oppression.
- Lack of gender sensitivity and intersectionality.
- Selective enforcement of laws and policies (pp. 268-281).

As one of the manifestations of antigypsyism, the forced sterilization of Romani women distinctly reveals the gendered dimension of this form of discrimination. In recent years, populist politicians have exploited specific demographic indicators, such as birth rates, to incite fear that the Roma population might eventually outnumber the majority population. Notably, such rhetoric and policies have disproportionately targeted Romani women while largely ignoring Romani men (Poposka and Jovevski 2024).

Forced Sterilization of Romani Women as Antigypsyism

According to the "Female Sterilization: A Guide to Provision of Services" published by the World Health Organization (2014), sterilization should be performed based on the principle of autonomy, as expressed through full, free, and informed decision-making (p. 9). This principle requires that "any counselling or information given by health care providers, other support staff or family members should be non-intrusive, allowing individuals to make decisions that are best for them, knowing that sterilization is a permanent procedure and that other, less permanent methods of fertility control are available" (World Health Organization 2014, 9).

Moreover, coercion in forced sterilization takes the following forms:

- The woman's consent was obtained under duress. In such cases, women are asked to sign consent forms while in labour/on their way to the operating room/or told that in order to receive another medical procedure, such as an abortion or caesarean section, they must consent to sterilization.
- The consent was invalid because the women were asked to sign a sterilization consent form without being provided with full and accurate information about the sterilization procedure.
- The women's consent was not obtained. In such cases, the women were never asked if they wanted to be sterilized, but were informed of their sterilization after undergoing a caesarean section (Open Society Foundations 2011, 1-12).

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Forced sterilization in the 20th and early 21st centuries was often based on ethnicity, targeting unwed mothers, pregnant women who attempted abortions, and poor populations. The most prominent forced sterilization policies in Europe were implemented in Austria, the Czech Republic, Denmark, Finland, France, Germany, Norway, Slovakia, Sweden and Switzerland. Of these, Austria, Germany, Sweden, Norway and Switzerland have taken responsibility for those policies and introduced special legal remedies for victims.

The forced sterilization of Romani women is an act where the victims are selected because of their ethnicity, an act of the state, which is carried out at a very vulnerable moment for the person herself, the moment of childbirth. Without her consent, her future and the future of her family were decided—the future of an entire generation and an entire community.

DEFINING HATE CRIMES AND THEIR INITIAL CHARACTERISTICS

By the term hate crime, criminal acts are meant in which the perpetrator is motivated by prejudice against the victim's group membership, in other words, against the victim's racial, ethnic, religious, or similar identity. The motive to commit the crime does not always include personal hatred towards the person or group; it may be based on a prejudice, an attitude that the person/group is "harmful" to society (Poposka and Jovevski 2017, 23). For an act to be characterized as a hate crime, it must contain the following two elements:

- Hate crime is always based on a committed crime that imposes some form of punishment for prohibited behaviour.
- The crime is motivated by bias or prejudice. At the same time, it is important to note that the perpetrator chooses the victim based on the bias and prejudice surrounding the group to which the victim belongs. It can be manifested as an act of intimidation, threats, material damage, assault, murder or any other crime (OSCE 2015, 23).

By targeting a person's identity, hate crimes cause more harm than ordinary crimes. Unlike victims of other crimes, victims of hate crimes are targeted for who they are. Accordingly, the perpetrator's actions can be experienced as an attack on the very core of a person's identity, which is devalued and denigrated. As a result, the immediate victim may experience greater psychological harm and increased feelings of vulnerability because they are unable to change the characteristic that victimized them (OSCE/ODIHR 2022).

Social acceptance of discrimination against certain groups is an important factor in increasing the incidence of hate crimes. This social acceptance has been shown to correlate with an increase in hate crimes, particularly in contexts where political rhetoric or media narratives reinforce stereotypes and dehumanization.

For example, the European Union Agency for Fundamental Rights (FRA) has documented that widespread societal prejudice contributes to the underreporting of hate crimes and the normalization of patterns of violence. According to FRA's 2018 report on hate crime recording and data collection in the EU, the lack of effective investigation and prosecution of hate crimes can foster a perception of impunity. This perception may embolden individuals who might otherwise refrain from such acts, leading them to believe that hate crimes are unlikely to have consequences (OSCE/ODIHR 2022). Hate crimes range from vandalism to severe physical

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violence, including murder, with the most severe cases often characterized by extreme levels of brutality and cruelty.

OSCE participating countries recognized the danger of ethnic hatred against Roma and Sinti as early as 1990. Anti-Roma rhetoric, including that which focuses on "Gypsy crime," can be continued in the media and by political actors. EU enlargement, together with the marginalization of Roma, has led many Roma individuals and families to seek better conditions and opportunities elsewhere through migration, often encountering adverse reactions within countries or areas. ODIHR's annual report on hate crimes presented a large number of hate crimes targeting the Roma. Assaults, property damage and homicides, including the use of explosives, firearms or Molotov cocktails, are included in these reports. Among the particularly worrying incidents reported to the BDIHR were fires set on Roma homes (Anti-Roma hate crime 2023).

Table 1: Statistical Overview of Hate Crimes Against Roma in European Countries (2014–2023) (Source: Anti-Roma hate crime 2023)

Violent Attacks on Individuals	Threats	Attacks Targeting Property	In Total	Year	States That Have Reported Hate Crimes Against Roma
25	4	2	31	2023	15
16	9	1	26	2022	13
35	16	6	57	2021	16
48	**18**	**18**	**84**	**2020**	**18**
41	**34**	**21**	**96**	**2019**	**22**
43	8	16	67	2018	14
30	15	8	53	2017	17
17	8	18	43	2016	10
27	18	18	63	2015	10
44	**14**	**29**	**87**	**2014**	**13**

From the presented statistics and the data available to us, it can be concluded that hate crimes against the Roma in Europe were most prevalent in 2014, 2019, and 2020, both in terms of the number of incidents and the number of countries affected. What is particularly encouraging is the decline in reported cases in recent years across all three forms of this crime: violent attacks on people, threats, and attacks targeting property.

ANALYSIS OF THE STATUTORY LEGAL FRAMEWORK OF THE EU

The right to health is guaranteed by the International Covenant on Economic, Social and Cultural Rights, the Convention on the Rights of Persons with Disabilities and the Convention on the Rights of the Child (UN 1976; UN 2008; UN 1990). Bodily autonomy is an integral component of the right to health. The Committee on Economic, Social and Cultural Rights, tasked with determining the content and scope of the rights guaranteed by the International Covenant on Economic, Social and Cultural Rights, noted that the right to health includes "the right to control one's health and body, including sexual and reproductive freedom and the right

to be free from interference, such as the right to be free from torture, forced medical treatment and experimentation" (Committee on Economic, Social, and Cultural Rights 2000).

Based on the above, the legal regulations that protect the rights of victims of forced sterilization should be emphasized, specifying where and how these rights are upheld:

- The Convention on the Elimination of All Forms of Discrimination against Women (CEDAW) also guarantees women's right to adequate maternal health services. It protects a woman's right to reproductive choice under Article 16. The Committee for the Elimination of Discrimination against Women, tasked with determining the content and scope of the rights guaranteed by the Convention, noted that the right to quality health services includes the obligation of states to ensure that health services are accessible and affordable. Acceptable services are services that enable reproductive choice and are delivered in a way that ensures that the woman gives her fully informed consent, respects her dignity, guarantees her confidentiality and is sensitive to her needs and perspectives (Committee on the Elimination of Discrimination against Women 1999).
- The right to be free from cruel, inhuman and degrading treatment is guaranteed under the International Covenant on Civil and Political Rights, the Convention on the Rights of Persons with Disabilities and the Convention against Torture and Other Cruel, Inhuman or Degrading Treatment or Punishment. Forced sterilization is a clear violation of this right. The Human Rights Committee, tasked with determining the content and scope of the rights guaranteed by the International Covenant on Civil and Political Rights, noted that the purpose of the right is to protect both the dignity and the physical and mental integrity of the individual from actions that cause not only physical, but also mental suffering. It further noted that the law protects individuals from cruel, inhuman or degrading treatment in "medical facilities" (Human Rights Committee 1992).

Gender-Based Violence Through the Prism of the Istanbul Convention

Acting within its leading role in the protection of human rights, the Council of Europe adopted the Convention on Preventing and Combating Violence against Women and Domestic Violence (known as the "Istanbul Convention"). The Istanbul Convention is generally accepted as the most far-reaching legal instrument in preventing and fighting violence against women and domestic violence, as one of the forms of human rights violations. Since its opening for signature in 2011, it has received significant support at all levels, both national and regional, with the European Union having acceded to and signed the Convention itself (Council of Europe Convention on Preventing and Combating Violence against Women and Domestic Violence 2011).

What is significant in the Convention is that it defines violence against women as a "violation of human rights," and domestic violence means "all acts of physical, sexual, psychological or economic violence that occur within the family or household." The Convention emphasizes the aspiration to create a Europe free from violence against women and from domestic violence, and the Member States of the Council of Europe and other signatories agree and emphasize that the Convention has the following objectives:

- Protect women from all forms of violence and prevent, prosecute, and eliminate violence against women and domestic violence.

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- Contribute to eliminating all forms of discrimination against women and promote substantive gender equality, including through women's empowerment.
- Establish a comprehensive framework, policies, and measures to protect and assist all victims of violence against women and domestic violence.
- Promote international cooperation to eliminate violence against women and domestic violence, and support organizations and law enforcement for effective, coordinated action (Academic 2017).

Concerning the hate crime of forced sterilization of Romani women, this aspect of the Convention provides an answer to the question: Why are only Romani women subjected to forced sterilization, and not Romani men? Gender inequality, combined with the vulnerable position of women, particularly during the sensitive moment of childbirth, leads to a discriminatory approach toward the victim: the Romani woman. Her powerless status in a society that seeks to punish and marginalize her solely for being both Roma and a woman is one of the core reasons behind the adoption of the Convention. The realization of both *de jure* and *de facto* equality between women and men is a key element in the prevention of violence against women.

The Istanbul Convention is already showing a positive impact on the lives of women across Europe. Asking governments to prevent violence against women, protect and support victims, and punish perpetrators in a comprehensive effort to end this type of violence means restoring the dignity of women victims.

GENDER-BASED DISCRIMINATION AMONG ROMANI WOMEN COMBINED WITH WIDESPREAD RACIAL DISCRIMINATION AGAINST ROMA

To fully understand the scope of this criminal phenomenon, it is essential to analyze the underlying concepts comprehensively. Forced sterilization is not an isolated act; it is the product of intersecting forces: antigypsyism (structural racism), gender-based violence (patriarchal power imbalance), and systemic legal and medical discrimination. These forces function simultaneously, where antigypsyism creates the target group, gender-based violence determines the method, and systemic racism enables impunity.

The Concept of Gender-Based Violence

The term gender-based violence is used to describe any harmful act committed against a person based on socially ascribed/gendered differences between men and women. It includes acts of causing physical, sexual or mental harm or suffering, or threats of such acts and other deprivations of liberty. While sexual violence can affect both women and men, women and girls are disproportionately affected. Certain groups are more vulnerable to violence, including girls and young women from poor, rural or marginalized communities, those who are or identify as LGBT+, those living with disabilities and girls and women who speak out on political, social and cultural issues and gender inequality (Gender-Based Violence Information Pack n.d.).

Gender-based violence can take other forms, such as denial of opportunities and access to education, health system and economic resources, etc. Some forms of sexual violence are

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more noticeable, such as physical violence. At the same time, other forms are more challenging to recognize due to the presence of harmful social norms that are physically evident. These include banning girls/women from seeing a doctor, attending school, working or handling money, as well as early marriage, marital rape, female genital mutilation, sexual comments, etc.

Understanding the consequences of sexual violence can also help us recognize its presence. There is no doubt that not only do women and girls suffer from the consequences of sexual violence, but also their families and children:

- Physical consequences range from relatively minor injuries to severe injuries that lead to death or permanent disabilities; unintended pregnancy or adverse pregnancy outcomes; sterility, sexually transmitted infections, urinary tract infections, etc..
- Psychological consequences include anxiety, nervousness, difficulty sleeping and concentrating, lack of appetite, anger and irritability, depression, self-harm and suicidal thoughts, and
- Social consequences include distancing the person from their friends and family, loss of job or income, dropping out of school, social isolation, and marginalization (Frederick et al. 2019).

The cause-effect relationship between systemic antigypsyism and forced sterilization is evident in how state institutions label Romani women as "excessively reproductive" and dangerous to demographic balance. This perception leads to targeted medical interventions that result in irreversible consequences, such as infertility, psychological trauma, social rejection, and community exclusion. These effects further reinforce marginalization and perpetuate cycles of oppression.

Analysis of the Case *V.C. v. Slovakia* (Application No. 18968/07)

In the case of *V.C. v. Slovakia*, the ECtHR unanimously determined that V.C. was a victim of forced sterilization in violation of Articles 3 and 8 of the European Convention on Human Rights. *V.C.* is a Romani woman who was sterilized in 2000 during a caesarean section of her second child (European Court of Human Rights 2012). When she was already in advanced stages of labour, the health staff told her that the subsequent pregnancy would be risky for her or her third child. Frightened by the information she received, *V.C.* signed the delivery note with a note stating that she had requested sterilization. In determining a violation of Article 3, the court noted that sterilization constitutes a significant interference with a person's reproductive health status and involves many aspects of personal integrity, including physical, psychological, emotional, spiritual and family well-being. When establishing a violation of Article 8, the court added that Slovakia did not fulfil its obligation to respect *V.C.*'s private and family life, that is, her reproductive health as a Romani woman.

On the other hand, the court refused to separately examine the violation of Article 14 (Prohibition of discrimination) due to a lack of material evidence.

It is disappointing that the court refused to consider the discriminatory character of forced sterilizations of Romani women. The court ruled that based on the available documents, it could not be established that the doctors involved acted in bad faith, that the sterilizations of

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the applicants were part of an organized policy, or that the conduct of the hospital staff was racially motivated.[3]

Judge Mijović attempted to emphasize to the court the reasons why he voted against the Council's finding that the rest of the applicant's claim for fair compensation should be rejected, as he considered that a violation of Article 14, if established, would necessitate the acceptance of these requirements. The judge immediately warned about the way the victim was seduced - "The patient is of Roma origin." The government explained that the entry in the medical file indicating the ethnic origin of the applicant was necessary because the social and health care of Roma patients was often neglected. Therefore, they required "special attention." This argument was deemed completely unacceptable by the judge, as the "special attention" referred to the applicant's sterilization, which was found to constitute a violation of both Article 3 and Article 8 of the Convention. According to him, the mere violation of Articles 3 and 8 reduces this case to an individual level. At the same time, it is more than evident that there was a general state policy of sterilization of Romani women under the communist regime (The Sterilization Regulation of 1972). He additionally refers to a third report on Slovakia, where ECRN stated that public opinion towards the Roma minority in the country remained negative. The fact that, at the time, other similar cases were pending before the court reinforced his conviction that the sterilizations performed on Romani women were not isolated incidents, but rather the result of a long-standing discriminatory attitude toward the Roma minority in Slovakia. In his view, the applicant had been "marked" and identified as a patient who should be sterilized solely because of her ethnic origin, as there were no medically justified reasons for the procedure. Consequently, this constitutes the most severe form of discrimination and a violation of Article 14, in conjunction with the violations established under Articles 3 and 8 of the Convention.

A Cruel Practice: Analysis of the ERRC Report

The European Roma Rights Centre (ERRC) has been a leading advocate for the rights of Roma communities across Europe, particularly regarding human rights violations such as forced sterilization. The ERRC has published several reports addressing the forced sterilization of Romani women, especially in countries where these practices have been more widespread.

According to the report "Coercive and Cruel: Sterilisation and Its Consequences for Romani Women in the Czech Republic (1966–2016)," Romani women in the Czech Republic were subjected to coercive and involuntary sterilizations, often performed without their free and informed consent. The report provides a comprehensive review of the institutional, legal, and policy contexts in which these sterilizations occurred, while placing particular emphasis on the personal experiences of sterilized Romani women. These accounts were gathered through individual interviews and focus groups with 22 women who had undergone involuntary sterilization (European Roma Rights Centre 2016).

The report highlights the systemic lack of legal remedies for women who were victims of forced sterilization. Despite the apparent violation of reproductive rights and bodily autonomy,

[3]On February 19, 2016, the District Court in Košice awarded a Romani woman, who was sterilized without her informed consent following the birth of her second child in 1999, compensation amounting to 17,000 euros. The decision was not final, as the hospital filed an appeal. For more details, please visit: http://www.errc.org/uploads/upload_en/file/coercive-and-cruel-28-november-2016.pdf

the legal systems in several affected countries often failed to provide justice or reparations to the victims. Many women were unaware of their legal right to challenge the procedure, and those who were aware often faced significant barriers in bringing cases to court.

The individual and group interviews with affected women, according to the report, focused on the circumstances of the sterilization and its consequences for the personal health and physical integrity of the women, but also on their general well-being and family life. The ERRC report underscores that in all cases, the women were not given a real opportunity to understand the nature and the consequences of the intervention that had been or would be performed on them. In the most extreme cases, Romani women were not told by medical professionals that they would undergo sterilization. This is the situation with all the interviewed Romani women from Ostrava, except Filomena, as well as the women from Krnov and Most, who were purposefully misinformed that the procedure had a temporary character. The other women were consulted about what the sterilization procedure entails. However, they were either coerced to undergo it by social workers under the threat of institutionalizing children or cutting their family welfare benefits, or persuaded that it was necessary for their health or to save their lives.[4] Discovering what had happened to them undoubtedly changed their lives forever.

The report emphasizes the role of the state in these practices, particularly in countries where sterilization was carried out as part of government-run programs. The ERRC calls for governments to take responsibility for these actions, acknowledge the harm caused, and provide reparations to the victims. The report also calls for stronger national and international laws to prevent forced sterilizations from occurring in the future.

CONCLUSION

In 1972, Czechoslovakia introduced a policy that allowed the authorities to encourage the sterilization of Roma and disabled women in mental institutions in order to control their birth rate (Cahn 2014). Although the official policy to encourage sterilization ended in 1991, social workers were reported to be coercing Romani women into sterilization through threats long after that (Albert 2016).

The above extract demonstrates how the Romani were subjected not only to ethnic discrimination but also to serious human rights violations, including gender-based violence and hate crimes. The targeting of Romani women by state authorities with the intent to reduce the Roma birth rate through forced sterilization reflects both racial and gender-based animus embedded in institutional practices.

If we go by the definition of what is gender based and that the victims are defended based on socially ascribed/gendered differences between men and women, we can conclude that in this hate crime, women are deliberately targeted because of their ability to bear children.

In this case, the possibility of reproduction was not limited to Romani men, but specifically to Romani women, bearing in mind their more vulnerable state during childbirth/or after childbirth. These particularly sensitive moments for women were used by medical

[4] The purpose of the law is to provide compensation to women who underwent involuntary sterilization; however, many of these women signed consent forms without receiving adequate information or did so under pressure, coercion, or misleading circumstances.

personnel to limit their reproductive freedom, leaving them no freedom of choice and thus affecting their family and community. The judgments before the ECtHR indicate that, as a result of their inability to bear children, they were then excluded/expelled from the Roma community.

Of particular importance for the topic addressed in this paper is the following: The Istanbul Convention primarily refers to women because it covers forms of violence that are either experienced exclusively by women due to their gender (such as forced abortion and female genital mutilation) or occur significantly more often against women than men (including sexual violence and rape, stalking, sexual harassment, domestic violence, forced marriage, and forced sterilization).

Gender-based violence against women is defined as violence that is directed at a woman because she is a woman or that disproportionately affects her. It is rooted in and perpetuated by unequal power relations between women and men, which are shaped by societal rather than individual factors.

Obstetric and gynaecological care is often overlooked in laws that address violence against women or gender-based violence. In addition, defining obstetric violence as a subset of gender-based violence emphasizes that it is a form of structural discrimination that requires systemic measures precisely because it limits/takes away women's autonomy and their ability to make decisions about their bodies and sexuality freely (Cohen 2021).

The World Health Organization (WHO) (2015) recognizes that many women around the world face disrespect, abuse or neglect during childbirth in health facilities. Only in the last few years has the global movement for women's human rights attempted to include in its legal framework the recognition of this form of gender-based violence that includes the mistreatment and abuse of pregnant women and mothers.

In 1971, the Communist Party of Czechoslovakia introduced a policy that legalized the offering of financial incentives to Romani women in exchange for sterilization. This discriminatory approach aims to control the Roma birth rate under the guise of promoting a healthy population. While non-Romani women were financially encouraged to have children, Romani women were forced not to give birth (Albert and Szilvasi 2007).

If the information listed above is analyzed in more detail, it can be observed that only the reproduction of Romani women was restricted, while that of Romani men was not. The primary objective was to reduce the Roma birth rate. If a Romani man wanted to have a child with a woman of another nationality, according to the above, they would even receive financial assistance.

In conclusion, the forced sterilization of Roma individuals, particularly Romani women, constitutes a clear and severe form of gender-based violence due to its direct attack on reproductive rights and bodily autonomy. The gendered nature of this violence is evident in how Romani women are targeted explicitly by state-sanctioned or medical professionals who use sterilization as a tool of control and marginalization, often under the guise of public health or eugenics. To address this issue, legal systems must recognize forced sterilization as a form of gender-based violence, ensuring justice, accountability, and the protection of reproductive rights for all women, especially those from marginalized communities.

Furthermore, the act of forced sterilization of Romani women constitutes a direct violation of their right to liberty, which encompasses bodily autonomy, personal freedom, and protection from cruel, inhuman, or degrading treatment. The notions of liberty and freedom,

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although overlapping, must be conceptually distinguished. Liberty in this context refers to legal and physical autonomy (the right to refuse a medical procedure). At the same time, freedom involves the broader capacity to live with dignity, make reproductive choices, and resist oppressive state policies. The violation of both constitutes a dual breach of legal personhood and existential human dignity.

The right to liberty is enshrined in multiple international human rights instruments, including Article 9 of the International Covenant on Civil and Political Rights (ICCPR) (UN 1967) which guarantees the right to liberty and security of person, and Article 3 of the Universal Declaration of Human Rights (UN, Universal Declaration of Human Rights 1948), which states that "Everyone has the right to life, liberty and security of person."

Forced sterilization infringes upon the liberty of Romani women by depriving them of their fundamental right to bodily integrity and personal autonomy. The absence of informed consent in such procedures denies women the ability to exercise control over their reproductive health, thereby violating their freedom to make autonomous decisions about their bodies and reproductive futures. Reproductive freedom is a core component of personal liberty. It is further protected under Article 8 of the European Convention on Human Rights (1950), which includes the right to respect for private life, encompassing both physical and psychological integrity.

Additionally, forced sterilization intersects with gender-based violence and structural discrimination, both of which exacerbate the infringement upon the liberty of Romani women. As victims of antigypsyism and gender-based violence, Romani women face compounded violations of their liberty, particularly when legal systems fail to provide adequate protection or compensation. The intersectionality of these violations reveals how racism and sexism operate jointly to restrict the liberty of marginalized groups.

Moreover, forced sterilization may also be seen as a violation of the right to freedom from torture and inhuman or degrading treatment, as protected by Article 3 of the ECHR (1950) and Article 7 of the International Covenant on Civil and Political Rights (ICCPR) (1967). Subjecting individuals to invasive medical procedures without their informed consent is a form of coercion that strips them of their liberty and dignity.

Furthermore, structural discrimination against Romani women limits their freedom to participate equally and freely in social, cultural, and political life. Practices of forced sterilization reflect and reinforce broader systems of oppression that restrict Romani women's access to justice, health care, and equal protection under the law. This denial of rights perpetuates a cycle of marginalization that severely limits their liberty and opportunities for self-determination.

The recognition of forced sterilization as a violation of the right to liberty is crucial for establishing accountability and promoting justice for the affected individuals. Legal frameworks, including the Istanbul Convention, CEDAW, and the ICCPR, all emphasize the importance of safeguarding individuals from gender-based violence and protecting their bodily autonomy. However, the intersection of antigypsyism and gender-based violence requires a more systematic approach that acknowledges the unique and compounded nature of these violations.

By framing forced sterilization as a violation of the right to liberty, it becomes evident that adequate legal protections must address not only the procedural aspects of obtaining informed consent but also the structural inequalities that continue these practices.

Finally, the analysis presented in this paper supports all three working hypotheses proposed at the outset. Firstly, the practice of forced sterilization of Romani women is not

merely a historical injustice, but a persistent form of hate crime, rooted in systemic antigypsyism and racial discrimination (H1). Secondly, the act itself is inherently gendered; it targets explicitly Romani women and reflects patterns of gender-based violence that violate both bodily autonomy and reproductive rights (H2). Thirdly, the examination of legal frameworks at national and European levels demonstrates a lack of comprehensive legal response that addresses the intersectionality of race, gender, and systemic oppression (H3). As such, forced sterilization must be understood as a manifestation of compounded structural violence, which deprives women of their liberty, violates fundamental human rights, and demands both criminal accountability and institutional reform.

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The Portrayal of Religious Freedom in Media Discourse: Evidence from Kosovo

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Abstract
This study examines how religious freedom is portrayed in Kosovo's media and how citizens perceive related tolerance and hate speech. A quantitative survey (N = 150) was conducted from March to April 2025 across six regions using simple random sampling. While 90% of respondents affirmed that religious freedom exists in Kosovo, only 35% rated media coverage as very good or excellent. Sixty percent believed Muslims receive the most media attention, and half noted that ethical standards in religious reporting are only partially upheld. The findings reveal a gap between the legal guarantee of religious freedom and its representation in the media, with negative narratives and online hate speech undermining democratic values and social cohesion in post-conflict Kosovo.

Keywords
Religious Freedom; Media Discourse; Kosovo; Hate Speech; Public Perception; Post-Conflict Society; Social Cohesion

INTRODUCTION

Human rights are the rights considered to be universal, inalienable, and inviolable rights with which every human being, as a social and biological entity, is born. They are deeply embedded in our political consciousness (Depre 2012). Since ancient times, humans have sought to establish mechanisms for promoting human rights and freedoms, a pursuit that has accompanied them throughout various historical periods. Human rights are inherent rights that are vested in every individual by virtue of being human (KWIRC 2005). When viewed through the lens of history, it becomes apparent that the origins of human rights are deeply rooted in both Greek philosophy and various world religions. During the Age of Enlightenment (18th century), the concept of human rights emerged as a distinct category of thought. Man/woman came to be seen as an autonomous individual, endowed by nature with certain inalienable fundamental rights that could be invoked against a government and should be safeguarded by it. Human rights were henceforth seen as elementary preconditions for an existence worthy of human dignity (Sepúlveda et al. 2004). However, one must not forget the early documents on human rights, which are fundamental and have served as a starting point for this long journey up to the present day, including the rights and freedoms related to religion.

The first were the Magna Carta Libertatum of 1215, the Golden Bull of Hungary (1222), the Danish Erik Klippings Håndfaestning of 1282, the Joyeuse Entrée of 1356 in Brabant (now Brussels), the Union of Utrecht of 1579 (The Netherlands), and the English Bill of Rights of 1689. These documents outlined rights that could be claimed under specific circumstances (e.g.,

threats to freedom of religion), but they did not yet present a comprehensive philosophical concept of individual liberty (Sepúlveda et al. 2004). Later, with social changes and developments, and the establishment of the United Nations, the first internationally oriented documents were introduced, aimed at promoting and advocating for human rights. In this context, the Universal Declaration of Human Rights, which has now been translated into over 500 languages worldwide, emphasizes in Article 1 that all human beings are born free and equal in dignity and rights. They are endowed with reason and conscience and should act towards one another in a spirit of brotherhood (Universal Declaration of Human Rights 1948). This reflects the evolution of human rights. Today, human rights are a reality, not a myth; they have developed into various categories and are actively promoted and advocated worldwide. Although they are often violated or abused in practice by national, regional, or local governments, or in various contexts such as sports, it can nonetheless be said that they have progressed compared to the past. Studies have emphasized that human rights are categorized into the following types: a) Civil and Political Rights, such as the right to life, the right to a fair trial and the right not to be subjected to torture; and b) Economic, Social and Cultural Rights, such as the right to work, to join a trade union, to health, to education, and an adequate standard of living (IHREC 2015).

Meanwhile, the authors Myrtezani, Hoxha, and Kamberi (2015) cite T.H. Marshall, who emphasized three types of rights: civil rights, which relate to the legal rights of individuals; political rights, particularly the right to participate in elections and hold public office; and social rights, which concern everyindividual's entitlement to enjoy a minimum standard of economic welfare and security. Nonetheless, the manifestation of freedom of belief and more broadly, religious freedom falls within the scope of human rights and is guaranteed not only by international legal instruments but also by domestic legislation. In Kosovo, as well as in other countries of the region, religious freedom remains a vital issue for the communities that live and operate within these states. On the other hand, the media are compelling entities that exert a considerable social influence on citizens. Through the media, people can be educated, informed, and form political, social, economic, religious, or other convictions, as well as understand the issues that are important in their lives. Recently, not only in Kosovo, but also in other countries of the region, a social discourse has emerged in the media concerning the extent and degree to which religious freedom is exercised.

Therefore, this paper explores and analyzes the role of religious freedom within media discourse, with a particular focus on the media's analytical approach to the religious freedom of communities. Therefore, this paper explores and analyzes the role of religious freedom within media discourse, with a particular focus on the media's analytical approach to the religious freedom of communities. The research questions posed in this study are: Does religious freedom exist in Kosovo's social environment; how is religious freedom reflected in social and media discourse; and what ethical standards guide the reporting of religious issues?

The main objectives of this paper are to identify the approaches to religious freedom within social discourse in Kosovo and to assess citizens' perceptions of hate speech related to religious freedom in the media.

LITERATURE REVIEW

Religious freedom is a philosophical concept that, in essence, relates to the expression of beliefs, thoughts, values, ideals, and the individual's right to articulate or manifest them. It is protected by the highest international legal instruments as well as by the laws of respective states. The foundational statement, Article 18 of the Universal Declaration of Human Rights, adopted by the United Nations in 1948, provides the most precise articulation of this recognition: Everyone has the right to freedom of thought, conscience, and religion. This right includes the freedom to change one's religion or belief, and the freedom, either alone or in communities with others, and in public or private, to manifest one's religion or belief in teaching, practice, worship, and observance (Hertzke 2012). As implied by this declaration, religious freedom is a potent human right that simultaneously encompasses the freedom of conscience and association, the right to own property, to publicly worship, publish, speak, petition government, and raise children according to family desires. Therefore, it can be said that religious freedom goes beyond mere participation in mosques, churches, synagogues, or other places of worship. It implies that individuals should not be required to go against their core values and beliefs in order to conform to cultural, societal, or governmental norms and policies. Hence, such protections are considered part of religious freedom. One of the prominent theories that has significantly addressed the role of religion within social systems is undoubtedly Niklas Luhmann's theory of social systems. He highlights that, from a systems-theoretical perspective, the most important aspect of modern world society is the emergence of a plurality of differentiated and autonomous societal domains. Niklas Luhmann identifies these as society's primary "subsystems," such as politics, economy, science, law, and others. Systems theory suggests that these domains function as "operationally closed autopoietic systems" (Stausberg 2025). Luhmann also observes that highly specialized, symbolically generalized communication media contribute to the growth of inequalities between these functional systems. It appears that systems such as the economy, which utilize highly effective symbolic media and can further refine these (e.g., money into stocks), gain influence.

Niklas Luhmann views the media as a closed system that constructs reality according to its logic (e.g., news values), often simplifying religious freedom into binary oppositions, such as "secular vs. fundamentalist." In local contexts, the media can also contribute to the production of hate speech, which may serve as an indicator of religious intolerance, especially in the Western Balkan countries. In "A Systems Theory of Religion," Luhmann (Stausberg 2025) proposes a theory of religion as part of a general theory of society. His focus always lies on if, when, and how religious communication comes to form an autopoietic, differentiated society. This "basic idea of religion as one of multiple function systems enables comparisons based on a broad range of concepts: communication, functions, (binary) codes, programs, contingency formulas, symbolically generalized communication media, organizations, and secularization" (Stausberg 2025). The theory emphasizes the inseparable nature of religion within society. In this context, religious freedom emerges as one of the most important segments of both religion and society. As can be observed, Luhmann paid attention to questions of the organization of religion. Early on, he proposed a distinction between interaction, organization, and society as a second key aspect of societal differentiation.

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Regarding media discourse and religious representation, contemporary media studies emphasize the crucial role of the media in shaping public perceptions of religious communities. Research demonstrates that media representation of religion significantly influences public attitudes toward religious freedom and tolerance. Studies have shown that media coverage often reflects societal biases and can either promote interfaith understanding or exacerbate religious tensions. The concept of media discourse analysis, as developed by van Dijk (2008), provides a framework for understanding how religious topics are constructed and presented in media narratives. This approach examines not only the content of media messages but also their ideological underpinnings and potential effects on audience perceptions. According to Muhammed Latif (2024), the media's censoring and selective reporting serve as the most potent tool for influencing public perception and reporting on reality. As a result, people obtain their knowledge from biased and mediated sources. The media outlets have assembled legions of pundits and reporters whose task it has been to malign and discredit Islam by linking it to terrorism, a societal ill in the world. However, research on religious freedom in post-conflict societies reveals unique challenges in balancing secular governance with religious diversity. Studies from Bosnia and Herzegovina, Northern Ireland, and other post-conflict regions demonstrate that the media plays a crucial role in either promoting reconciliation or perpetuating divisions between religious communities.

The literature suggests that in post-conflict contexts, media coverage of religious freedom often reflects broader societal tensions and unresolved conflicts. This is particularly relevant for Kosovo, where the intersection of religious and ethnic identity creates complex dynamics in media representation. In a world fraught with conflict and instability, the media often finds itself at the forefront of shaping public perception and influencing global responses to crises. Through a series of case studies spanning different regions and historical contexts, which can be purchased here, we have explored the profound impact of media on conflict dynamics, from serving as an early warning catalyst to advocating for peace and reconciliation (Orfanau 2024).

In the regional context, comparative studies of religious freedom in Southeast Europe reveal common patterns across the region. Research indicates that, while legal frameworks generally protect religious freedom, implementation varies significantly. Media representation of religious communities often reflects historical tensions and contemporary political dynamics. Studies from Albania, North Macedonia, and Serbia show similar patterns in media coverage, with the majority religious communities typically receiving more favorable treatment than minority groups. Several relevant studies from the Western Balkans provide important comparative insights for this research. For instance, Frendo (2018) examines religious pluralism and interfaith relations in Albania, highlighting the coexistence model and its challenges in a post-communist context. Similarly, Ali et al. (2024) analyze religious identity and societal cohesion in North Macedonia, revealing how media narratives shape public perceptions of religious diversity. These studies are particularly significant for the present research because they address countries with historical legacies, cultural contexts, and transitional political systems comparable to those of Kosovo.

Many religious leaders representing religious minorities across the region claim that issues within their communities are underreported or ignored. Franciscan priest Marko Oršolić from Bosnia and Herzegovina noted in an interview for the weekly "Vreme" that when someone

is a minority, they are often more interested in starting a dialogue. However, the majority rarely engage in it authentically and sometimes criticize minorities for benefiting from such dialogue (Kisić 2020). This regional context provides an important comparative perspective for understanding Kosovo's situation. Each of the theoretical frameworks plays a key role in the development of communication, particularly regarding the expression of religious freedom.

In the case of Kosovo, religious freedom is guaranteed by the highest legal and political act, the Constitution of the Republic of Kosovo (2008), which explicitly states in Article 8 that "The Republic of Kosovo is a secular state and is neutral in matters of religious beliefs." Article 38, titled "Freedom of Belief, Conscience, and Religion," further states:

> 1. Freedom of belief, conscience and religion is guaranteed. 2. Freedom of belief, conscience and religion includes the right to accept and manifest religion, the right to express personal beliefs and the right to accept or refuse membership in a religious community or group. 3. No one shall be required to practice or be prevented from practicing religion, nor shall anyone be required to make his/her opinions and beliefs public. 4. Freedom of manifesting religion, beliefs and conscience may be limited by law if it is necessary to protect public safety and order or the health or rights of other persons.

The freedom to manifest one's belief is exercised following the Constitution and other applicable legal instruments. Upon further analysis, it becomes evident that Luhmann's examined theory plays a crucial role in the relationship between the state and religious organizations, which are largely secular in modernity. However, religious freedom transcends this relationship, a dynamic that is not emphasized in Luhmann's studies. Therefore, this paper aims to explore and further analyze the portrayal of religious freedom in media discourse, including the media space allocated to religious denominations and the role of media in building bridges for interreligious harmony.

METHODOLOGY

Research methodology encompasses many dimensions, and research methods constitute one key component of it. The scope of research methodology is broader than that of research methods (Kothari 2004). Regarding the research methodology, the process began with the analysis and review of the relevant literature for this study. A comparative method was employed to examine various scientific theories, and an empirical study was also conducted, involving respondents (citizens). A research design is simply the framework or plan for a study, used as a guide for collecting and analyzing data (Pandey and Pandey 2015). To strengthen the research framework, a broader context was incorporated to provide a more comprehensive understanding of the findings. A quantitative survey was conducted using a virtual format via Google Forms. The study had a total of 150 respondents. A simple random sampling method was employed, and the research was conducted from March to April 2025. Of the total respondents, 60% were men and 40% were women, and the study included participants from various regions of Kosovo (Pristina, Peja, Mitrovica, Gjilan, Prizren, and Gjakova). The research instrument used was a questionnaire, while the data collection technique was virtual due to time constraints. The questionnaire consisted of biographical data and a set of 10 main questions

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designed to measure perceptions of religious freedom representation in media discourse. After the data had been collected, they were carefully analyzed and organized into a database, with additional cross-tabulation analysis conducted to examine differences between religious groups.

In general, the research methodology consisted of three main phases. The first phase involved content analysis and a review of literature relevant to the study, including a comparative analysis of regional contexts. The second phase involved designing the questionnaire, testing relevant hypotheses, and incorporating questions designed to capture cross-group differences in perception. The third and final phase consisted of implementing the research and collecting data, followed by a comprehensive analysis that included cross-tabulation by religious affiliation and regional comparison. Additionally, in order to further strengthen the quality of this article, a qualitative research study was also conducted.

As part of this study, three (3) semi-structured, in-depth interviews were conducted with experts in social media, who provided their professional insights. The selection of these experts was based on their profession and experience. The research instrument employed, the in-depth interview, excluded biographical data and focused exclusively on questions related to the study topic, specifically the language used on social media regarding religious freedom. This analysis was conducted in April 2025 and examined two social media platforms, which served as sources for citizens' comments containing hate speech.

It is important to acknowledge the limitations of this study. First, the sample size of 150 respondents, while providing valuable insights, limits the generalizability of the findings. Second, the study does not include a direct content analysis of media coverage, relying instead on citizens' perceptions. Third, the research was conducted during a specific timeframe (March–April 2025) and may not capture seasonal variations in media coverage or public perception.

MANIFESTATION OF RELIGIOUS BELIEFS: FREEDOMS AND RIGHTS

The freedom to manifest one's religious beliefs is a constitutional right of every individual in the states where they reside and operate. At first glance, the concept of freedom of religion may appear contradictory: freedom implies the absence of constraints, while religion entails a self-imposed framework of constraints. This makes freedom of religion a unique human right. Religion serves as an all-encompassing, normative system, providing a comprehensive set of values that guide all aspects of life. Therefore, it poses an alternative authority to that of the state. In this regard, religious freedom differs from other human rights (Scolnicov 2010).

Other human rights, such as free speech or privacy, are not associated with an alternative normative system. There is simply no such thing as a normative system of speech or privacy. The construction of the right of freedom of religion must therefore deal with elements of constraint as well as freedom. Therefore, the interpretation and protection of religious freedom as a human right are more complicated than those of other rights (Scolnicov 2010, 36). In this context, the freedom to manifest religious belief is one of the fundamental human rights. In Kosovo, this right is guaranteed by the Constitution and the Draft Law on Amending and Supplementing Law No. 02/L-31 on Religious Freedom in Kosovo, which recognizes six religious communities as official religious communities in the Republic of Kosovo, thereby constituting an integral part of the country's historical heritage, cultural, and social life. These communities are: the Kosovo Islamic Community, the Catholic Church, the Serbian Orthodox Church, the Jewish Religious

Community, the Kosovo Protestant Evangelical Church, and the Tarikate Community of Kosovo (Draft Law on Amending and Supplementing Law No. 02/L-31 on Religious Freedom in Kosovo 2022). This draft law also outlines the obligations and relationships between religious institutions and state institutions based on the principle of secularism. In general, religious freedom is guaranteed and publicly exercised in places of worship. Accordingly, freedom of thought, conscience, and religion is a fundamental human right, which, in addition to its profound importance for the life of an individual, also holds exceptional significance for society as a whole.

This right encompasses a broad range of beliefs and convictions, thus representing a source of pluralism that is an integral part of democracy (Petrela and Xhepa 2021). The 2023 International Religious Freedom Report, prepared by the US Embassy in Kosovo, emphasizes that the Constitution prohibits religious discrimination and provides grounds for religious freedom, subject to limitations necessary to ensure public order, health, and safety, or to protect the rights of others. The law criminalizes the incitement of religious disputes and intolerance between religious groups, as well as other criminal acts in which religion serves as a motivating factor or an aggravating circumstance. However, the law does not provide a mechanism for religious groups to obtain legal status (US Embassy 2023). From this, it can be concluded that the freedom to manifest religious belief is expressed by religious communities that practice their religious rituals. Perhaps the problem lies more with the media, which often, through "sensational" headlines, signal the development of hate speech, primarily through the comment sections. In an interview conducted with F. Kamberi (2025), a professor and media analyst, regarding the question "How much religious freedom exists in Kosovo and how is it manifested?", the professor emphasized:

> Religious freedom is a social construct in Kosovo and a constitutional principle, guaranteed by the Constitution and current legislation. It is manifested through cooperation among religious denominations, interfaith relations, the promotion of religious tolerance, and collaboration between religious and state institutions—particularly in addressing radicalization and violent extremism—which has significantly contributed to enhancing citizens' sense of security and fostering broader societal stability.

For this purpose, respondents' perceptions of the presence of religious freedom in Kosovo's social environment were also measured, as shown in Figure 1. As can be seen from the field data, over 90% of respondents from both genders stated that there is freedom to manifest religious belief in the social environment of Kosovo; 7% somewhat agreed, while 3% disagreed. These results suggest that religious freedom appears as a form of tradition that has been carried on from the past. All religious communities freely practice their faith in places of worship, celebrate religious holidays, and often organize conferences, seminars, and other events aimed at strengthening coexistence and interreligious tolerance.

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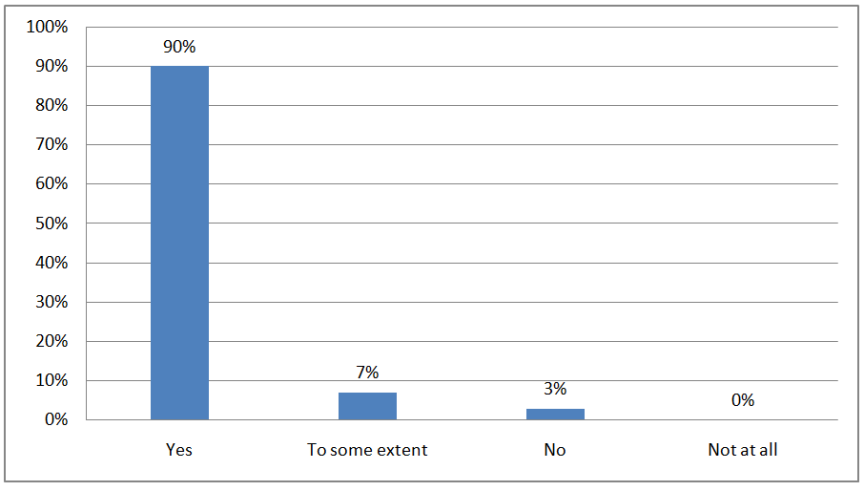

Figure 1: Does religious freedom exist in the social environment of Kosovo? (Source: Kuqi and Esati 2025)

According to a recent study conducted by Friedrich-Ebert-Stiftung Kosovo (FES) on youth in Kosovo, approximately 36% of young people in Kosovo can be considered closely connected to religion, as they attend religious services at least once a month. Males appear to be more religious than females. There is a strong correlation between the participation of youth in religious services and their parents' level of religiosity (Spearman's rho = .329, $p < 0.001$). Half of the young people from religious families still demonstrate a high level of participation in religious services, indicating a significant transmission of religious behavior. Moderately religious families seem to show a more neutral distribution in terms of their younger members' participation in religious services (FES 2019). Perceptions of believers are presented in Table 1, as reported in a study conducted by Roman et al. (2020).

Table 1: Distribution of Respondents by Variables and Countries (Source: Roman et al. 2020)

Observed Variable	Value	Bosnia and Herzegovina (%)	Bulgaria (%)	Croatia (%)	Romania (%)	Balkans (%)
Religious Confession	Christian	39.74	74.07	89.53	97.77	78.13
	Muslim	55.78	15.52	0.47	0.15	15.07
	Other	0.10	0.69	2.53	0.08	0.97
	No religion	4.38	9.72	7.47	2.00	5.83
Frequency of Church Attendance or Mass	Regularly	13.15	5.21	9.07	7.60	8.71
	Often	19.82	11.20	14.47	16.97	15.57
	Sometimes	56.27	63.46	53.07	44.70	53.67
	Never					
		10.76	20.14	23.40	30.72	22.06
Frequency of Observing Religious Holidays	Regularly	72.61	40.18	63.80	23.04	49.65
	Often	15.54	24.95	16.60	37.02	23.65
	Sometimes	9.56	18.66	11.27	24.73	16.11
	Never					
		2.29	16.21	8.33	15.21	10.59

Intention to Emigrate	Very Strong	23.71	6.68	7.27	17.13	13.23
	Much	22.01	24.46	19.20	22.73	21.85
	Some	3.09	29.17	32.07	21.35	22.53
	None	51.20	39.69	41.47	38.79	42.39
Sample Size		1004	1018	1500	1302	4824

It is worth mentioning that, as a result of data tests conducted during the research, the variables recording the Frequency of Praying and Having Confession were excluded, since these practices were found to differ across countries and religious denominations. Nevertheless, regardless of the varying perceptions surrounding religious belief and participation in religious services, religion is protected by normative acts and is publicly manifested. It is further observed that this manifestation of belief is sometimes portrayed differently in media discourse, at times generating social narratives with negative connotations—particularly on social media platforms, where hate speech can escalate tensions. Relevant studies emphasize that hate speech "has been prevalent in human interactions in many forms over time in the actual world (such as racism and prejudice), and now it has found a carrier in the virtual world defined by social media Internet" (Nazmine et al. 2021). Furthermore, the four important stages of hate speech, as emphasized by Citron and Norton (2011), are presented in Figure 2.

Figure 2: Stages of Hate Speech (Source: Nazmine et al. 2021)

The target of hate speech is not based solely on a single identity. It can be based on various factors, including religion, ethnicity, disability, and gender (Seglow 2016). In this article, online hate speech is reviewed concerning gender, race, and religion. Based on these studies, it is concluded that hate speech constitutes a form of expression that manifests through multiple forms and means, producing social deconstruction not only within society but also, more broadly, within the democratic system.

THE REPRESENTATION OF FREEDOM OF BELIEF IN MEDIA DISCOURSE

Today, the media are considered a driving force of globalization and are regarded as both an independent entity and a fundamental pillar of democracy; the absence of which would diminish democratic functioning. The role of the media in social change, and potentially in social progress, is often assumed rather than systematically investigated. "Media" are inherently complex, both in their nature and in their consequences. By "media," reference is made primarily to technologies used for the production, dissemination, and reception of communications; however, following the common usage of the term and its equivalents in many languages, content distributed through these technologies and the institutions associated with their production, dissemination, and reception are also included.

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By "social progress," reference is made to the development of societies in ways that progressively enable human beings to fulfil their needs and capabilities (Couldry et al. 2017). Nevertheless, during the research, respondents' perceptions, evaluations, and attitudes regarding the representation of religious beliefs in media discourse within Kosovar society were measured, as presented in Table 2.

Table 2: Questions on the Social Discourse of Religious Freedom in the Media and Ethical Standards for Reporting on Religious Issues (Source: Kuqi and Esati 2025)

Questions	Answers	Percent
How Is Religious Freedom Reflected in Social and Media Discourse?	Excellent	5%
	Very good	30%
	Average	30%
	A little	25%
	Not at all	10%
What Ethical Standards Guide the Reporting of Religious Issues?	Yes	40%
	To some extent	50%
	No	7%
	Not at all	3%

Based on this table, which includes two important questions, it can be observed that approximately 30% of respondents indicated that social discourse on religious freedom in the media is reflected very well, 30% indicated it is reflected moderately, 5% indicated it is reflected poorly, 5% indicated it is reflected excellently, and 25% indicated it is not reflected at all. Regarding ethical standards in reporting on religious issues, about 50% of respondents stated that such standards exist to some extent, 40% stated that they do exist, 7% stated that they do not, and only 3% indicated that no ethical standards exist at all. Although the sample size is small for measuring such perceptions, it still provides a helpful instrument for further analysis of this segment. During the studies, specifically through media analysis, it was observed that hate speech is manifested through various forms or patterns, which serve as indicators of the presence of negative comments, hatred, xenophobia, racism, and other forms of discrimination, particularly within a religious context.

In a study conducted by the author Jeta Rexha (2023), it is revealed that the majority of hate speech cases are linked to the negative labeling or stereotyping of groups, accounting for approximately 72% of such incidents. Insults account for 49% of the cases, followed by threats and potentially threatening statements to security personnel, which comprise 12% of the total. Furthermore, most of these incidents were carried out by private individuals, representing 68% of all occurrences. Journalists or media personnel constituted the second-largest group involved, contributing to 23% of the identified cases, followed by politicians, members of political parties, and state officials, with 15% (Rexha 2023, 9). The monitoring process identified Facebook as the primary platform where hate speech incidents occurred, with 106 out of a total of 112 recorded cases. During the monitoring period, Facebook was identified as the primary platform for displaying hate speech, accounting for 106 out of the total 112 registered cases. This trend underscores the platform's role in the spread of hate speech, primarily carried out by private individuals. These incidents were observed on both personal pages and the Facebook pages of news portals (Rexha 2023).

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Hate speech is manifested in social discourses, particularly on social media. It often appears in various forms, especially with the emergence of the "Decani Movement"—a movement that calls on all Albanians of Islamic faith to return to Christianity. In an interview for the media outlet Observer.al, the presence of hate speech in the media and Kosovar society was highlighted by Besnik Sinani, a doctoral candidate in the study of history, societies, cultures, and Islamic religion at the Freie Universität in Berlin (Germany), with particular emphasis on the significant presence of Islamophobia. According to Sinani, the existence of Islamophobia in Albania or Kosovo, despite available evidence, is still debated—even, surprisingly, by some Muslim activists who deny the possibility of Islamophobia in a country with a nominal Muslim majority. However, Islamophobia is not determined by numerical majorities but rather by power relations and dynamics, as defined by Michel Foucault's disciples among post-colonial scholars. Among Albanians in general, Islamophobia is identity-based, and Islamophobic discourse is intended to be all-encompassing and totalitarian. This is also the reason why school textbooks have been identified as among the most distinctive elements of Islamophobic policies (Observer.al 2020). Consequently, the presence of hate speech is reflected not only toward the Islamic faith but more broadly within society. Hate speech has been incorporated into hybrid strategies or hybrid wars, which have notably increased in recent times and are intended to generate social insecurity, panic, fear, and various forms of societal division.

In social discourse, religion is often portrayed negatively, particularly in the context of relations between Islam and Catholicism, sometimes accompanied by social media comments that contain hate speech. Democracy, both as a political and philosophical concept, is arguably the best possible system that allows all citizens to express their thoughts, beliefs, and values, up to the point where the thoughts or values of others are infringed upon. In this context, the findings of this study, despite its limitations, indicate that the current media discourse in Kosovar society does not fully or adequately address religious belief. In practice, it often takes on a different connotation. For this reason, respondents expressed moderate or partial agreement with the existence of ethical standards in the media concerning this topic. While freedom of belief is generally exercised freely, media discourse often tends to favor one religion over another, lacking the rational balance that should ideally be present. This may be due to various factors, including geopolitical shifts, the targeting of Islam as a religion in contrast to others, ongoing conflicts in the Middle East, religious prejudices and stereotypes, the absence of a specific law on religious freedoms, and the lack of clearly defined positions for religious communities, among others.

Based on the research findings, as shown in Figure 3, it was indicated that approximately 60% of respondents believe that Muslims (Sunnis) currently have the most significant media presence, 20% indicated Catholics, 15% indicated Protestants, 2% indicated Orthodox Christians, and 3% indicated Bektashis. This suggests that, regardless of respondents' perceptions, all religious denominations are represented in Kosovar media, including broadcasts in their respective languages, such as Serbian, which are transmitted through various television channels. Media discourses addressing topics involving religion, however, are often presented from different perspectives, with statements or opinions, whether from religious clerics or legal analysts, frequently taken out of context. Consequently, discourse on social media platforms often includes hate speech, creating an unhealthy model for society. Headlines in the media are frequently designed to increase clicks, and such headlines often reflect a tone of panic,

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contributing to the proliferation of negative or stereotypical comments, particularly toward Islam. Examples include: "Albania and Kosovo fear the rise of Islamism" (Balkanweb 2016) and "From today on, we are not Muslims / the movement that 'troubled the waters' in Kosovo – the initiators reveal their purpose, BIK (Islamic Community of Kosovo) representatives also speak" (Rugova 2023). Such headlines, often containing divisive elements or lacking structural and substantive rigor, can nevertheless influence the development of social discourse in Kosovo.

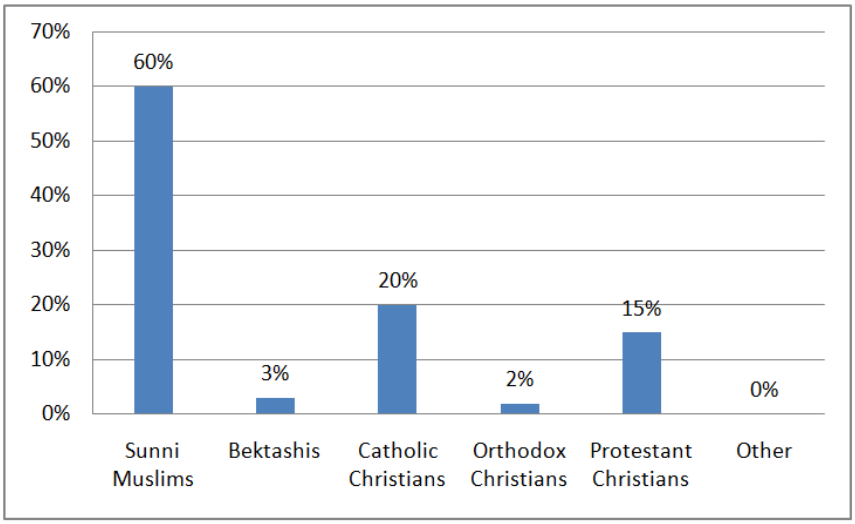

Figure 3: Which Religious Denominations Receive the Most Media Coverage? (Source: Kuqi and Esati 2025)

Finally, it is essential to emphasize that social discourse on religion should foster a culture of communication and dialogue, present rational arguments, ensure equality among participants, and, above all, build bridges between communities. This approach can also serve as a model for younger generations who use social networks and represent the future of society.

CONCLUSION

Based on the above elaboration, it can be concluded that the manifestation of religious freedom is recognized as a human right, guaranteed by the highest international instruments as well as by the legislation of the respective states. The issue of freedom of belief, its public expression, and other rights deriving from international instruments are regulated by each state following international acts. In Kosovo, freedom of belief is exercised freely and is guaranteed for all communities living and operating in the country.

The research findings reveal several key insights regarding the representation of religious freedom in Kosovo's media discourse. At the same time, 90% of respondents confirm the existence of religious freedom in Kosovo's social environment, but only 35% express satisfaction with its portrayal in the media. This discrepancy between legal guarantees and media representation suggests that significant improvements are needed in the media's coverage of religious topics. Substantial differences were observed in how various religious communities perceive their media treatment. Despite representing the majority, Muslim respondents reported

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higher levels of negative portrayal (60%) compared to Catholic respondents (30%), suggesting that media representation is influenced by factors such as editorial bias or societal prejudice rather than demographic size. The finding that 60% of respondents believe Muslims receive the most media coverage, while simultaneously reporting negative portrayals, highlights a disparity between visibility and quality of representation, which poses challenges for interfaith harmony and democratic discourse.

The findings also carry important implications for Kosovo's democratic development and social cohesion. Media representation of religious freedom functions as an indicator of the health of democratic discourse in a diverse society. When media coverage consistently portrays specific religious communities negatively or fails to uphold ethical standards, fundamental democratic principles of equal treatment and respect for all citizens are undermined. Traditional media biases are further amplified through social media platforms, where hate speech and inflammatory commentary can reach broader audiences and create lasting negative impacts on interfaith relations. This digital amplification of religious intolerance represents a significant threat to Kosovo's social fabric and democratic stability. Comparative analysis with regional countries demonstrates that these challenges are part of broader Balkan patterns, while also providing opportunities for learning from best practices and developing collaborative approaches to improve media coverage of religious topics.

Several limitations of the study must be acknowledged. The sample size of 150 respondents, although providing valuable insights, restricts the generalizability of findings to the broader population. The study relies on citizen perceptions of media coverage rather than systematic content analysis of actual media outputs, which may not fully capture the complexity of representation patterns. A lack of longitudinal data prevents assessment of whether media representation patterns are improving or deteriorating over time. Finally, structural analysis of individual religious group perceptions was not conducted in sufficient detail, limiting insights into intra-group variations.

Based on the findings and limitations, several future research directions are recommended. Longitudinal media content analysis should be conducted to identify patterns, trends, and the effectiveness of interventions. Comparative regional studies should be expanded to examine media representation across Balkan countries and identify successful models of balanced religious coverage. The role of social media in amplifying religious intolerance warrants further investigation, alongside strategies to promote constructive online discourse. The effectiveness of training programs for journalists on ethical coverage and interfaith relations should be assessed, and the impact of existing legal frameworks on media coverage should be evaluated to inform policy improvements. Additionally, research should explore how media representation influences younger generations' attitudes toward religious diversity and tolerance.

This study makes a foundational contribution to understanding the representation of religious freedom in Kosovo's media discourse. While significant challenges in media coverage and public perception have been identified, a roadmap has been established to improve media representation of religious communities and strengthen democratic discourse. The research demonstrates that legal protection for religious freedom alone is insufficient; sustained efforts are required to enhance media representation and public discourse regarding religious diversity.

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CRediT AUTHOR STATEMENT

Ilmije Kuqi: conceptualization, methodology, writing-original draft preparation. **Lulzim Esati:** conceptualization, investigation.

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Crossroads of Peace: Advancing Regional Integration and Global Trade Through Post-Conflict Cooperation

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Abstract
This article examines the potential economic benefits of the Crossroads of Peace (CoP) initiative proposed by the Government of Armenia. To assess regional trade dynamics, three indicators were applied: the Export Similarity Index (ESI), the Trade Complementarity Index (TCI), and the Revealed Comparative Advantage (RCA). The findings reveal that the ESI between Armenia and its regional partners, Türkiye and Azerbaijan, is 0.25, indicating minimal competition in export markets. In contrast, the TCI score of 0.5 from the region to Armenia suggests a relatively higher degree of complementarity, highlighting stronger opportunities for regional exports to Armenia than vice versa. Furthermore, Armenia's projected trade volume with Türkiye in 2024 is estimated at USD 787 million, underscoring the initiative's potential to foster significant economic exchange.

Keywords
Crossroads of Peace; Armenia; Türkiye; Azerbaijan; Regional Trade; Export Similarity Index; Trade Complementarity Index; Freedom of Movement

INTRODUCTION

The Crossroads of Peace (CoP) initiative, proposed by the government of the Republic of Armenia, envisions an economic transformation for the South Caucasus, a region with untapped potential situated at the intersection of modern and historical trade routes. Situated at the crossroads of Europe and Asia, Armenia has long stood at a pivotal point of commerce, innovation, and diverse cultures. The CoP introduces a complementary network of routes designed to enhance the strategic importance and expand the capacity of the Trans-Caspian Corridor. These connections will create additional logistical pathways and position the South Caucasus as a competitive transit option for accessing major markets in the Middle East, Europe, and Asia.

The initiative also seeks to revive long-stalled economic cooperation hindered by decades of conflict and political fragmentation. Blocked roads, abandoned transportation corridors, and closed borders, including the Armenia–Türkiye border, which has been sealed since 1993, have prevented the region from capitalizing on its geographical proximity and historical trade links. Research indicates that these barriers impose substantial economic costs, with Armenia and Azerbaijan incurring estimated annual GDP losses of 3% and 2.4%, respectively, due to conflict-related expenditures and reduced investment (Saha et al. 2018). Moreover, the German Economic Team (2022) suggests that opening the Armenia–Türkiye border could raise Armenia's trade with Türkiye from less than 1% to over 10% of its total trade volume, representing approximately $123 million in additional annual exports. By leveraging the

region's natural geographic advantages, the CoP has the potential to build new bridges between nations and drive them toward regional prosperity and stability.

Classical liberalism, as seen in Adam Smith's "The Wealth of Nations" (1776) and David Ricardo's "On the Principles of Political Economy and Taxation" (1817), emphasizes that free markets and reduced barriers enhance both economic efficiency and individual liberty. In conflict-affected regions such as the South Caucasus, these principles gain particular relevance, as closed borders not only distort economic potential but also restrict the fundamental freedom of movement for millions of people.

Liberal economists have long recognized that barriers to the mobility of labor and goods significantly limit human freedoms and liberties (Mill 1848). While some influential thinkers have raised security concerns regarding immigration, they nonetheless acknowledge that free labor mobility is an essential component of both economic prosperity and liberty (Friedman 1980).

This study, mindful of contemporary debates over border policies, supports the ideas of liberal economic theory, exploring how economic rationality can reduce tensions and expand personal freedoms through carefully managed regional integration.

While existing literature examines the role of infrastructure in post-conflict development, limited research has quantified trade complementarities in the South Caucasus or modeled the potential economic impacts of border re-opening.

This study addresses that gap by employing Trade Complementarity Index (TCI) analysis, Export Similarity Index calculations, and gravity modeling to assess Armenia's trade potential with Türkiye and Azerbaijan.

Fundamentally, the CoP initiative supports the principle that well-developed infrastructure, modern railways, border crossings, and restored trade routes are essential for sustainable economic growth (Spolaore and Wacziarg 2005). Through this initiative, Armenia is advancing the establishment of seven border checkpoints with Türkiye and Azerbaijan, complemented by the restoration of four key railway lines totaling approximately 130 km. These include the Nrnadzor–Agarak branch (43 km), the dismantled Hrazdan–Kayan section (80 km), the 1-km Yeraskh–Nakhichevan border link, and the 6-km Gyumri–Türkiye border connection. In addition, five new railway checkpoints will be introduced, four along the Armenia–Azerbaijan border and one on the Armenia–Türkiye border, transforming former dividing lines into bridges for economic exchange (Bruggeman-Sękowska 2023). The project's road infrastructure component is equally ambitious, including the complete reconstruction of the North–South Highway (approx. 461 km), along with major East–West corridors such as Kayan–Armavir (approx. 210 km), Kayan–Akhurik (approx. 170 km), Goris–Angeghakot (approx. 84 km), and Sotk–Yeraskh (approx. 271 km) (Arm Road n.d.).

Together, these routes will enable greater transit efficiency across Armenia's territory, linking the Black Sea, the Caspian Sea, and the Persian Gulf region (Union of Informed Citizens 2021). This integrated network is designed to establish Armenia as a reliable transit hub between the Middle East, Central Asia, and Eurasian markets, offering reduced congestion and shorter distances for specific trade flows.

Railway rehabilitation will significantly reduce transportation costs, streamline supply chain operations, and support the development of modern logistical routes through Armenia. These routes will be significant for Middle Eastern and Central Asian exporters seeking efficient

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access to European markets, with the Armenian corridor providing an alternative high-capacity transit option featuring lower congestion and shorter distances for specific flows.

Enhanced railway accessibility will also benefit countries such as China and India by contributing to a more interconnected and multipolar transport network across the continent, as well as neighboring Georgia through the North–South corridor. The revival of these routes aligns with global efforts to diversify supply chains, reducing overreliance on any single port or corridor.

Armenia's geography positions it as a vital integrating element among adjacent trade zones, with cumulative impacts including stronger commercial ties, lower transaction costs, and greater investment attractiveness across sectors ranging from services to agriculture and manufacturing.

Beyond short-term objectives, the CoP project presents an opportunity to build enduring frameworks for cooperation. Infrastructure investments promise sustained benefits across multiple areas of the economy. Studies suggest that every dollar invested in transportation infrastructure generates approximately 1.5 times that amount in economic returns, as improved trade routes boost productivity, lower logistical costs, and expand market access (Global Infrastructure Hub 2021). These benefits extend beyond economics; enhanced connectivity lays the foundation for stable and resilient regional partnerships.

The CoP represents an opportunity to jumpstart regional trade links and align them with global economic trends. In today's world, fragmented markets create inefficiencies, while interconnected economies thrive through cooperative ventures. The Trade Complementarity Index (TCI) analysis, discussed further below, supports this view by revealing a moderate yet promising correlation between the Republic of Armenia's import needs and the export strengths of Türkiye and Azerbaijan. If adequately implemented, trade among the South Caucasus countries can become more diversified and competitive, generating long-term gains for all participants. These findings are consistent with the research of Chandran (2010) and Martincus et al. (2018), who emphasize that trade complementarities drive bilateral trade expansion and strengthen economic interdependence.

By focusing on pragmatic economic outcomes, the CoP initiative shifts attention away from political disputes and highlights the value of economic cooperation. In this way, peace can become not just a goal but a byproduct of practical collaboration and shared economic interests. Success, however, requires recognizing that countries linked through trade become interdependent gradually, with political sensitivities and regulatory frameworks influencing the process. While economic interdependence can reduce the likelihood of conflict, sustained commitment from all parties is essential to overcome historical divisions.

Ultimately, the CoP represents a vision for the entire region achievable through cooperation. Infrastructure that supports trade and tourism not only enhances economic performance but also fosters dialogue, builds trust, and lays the foundation for lasting peace. As countries work together to capitalize on the opportunities created by this project, they contribute to a regional order where commerce, rather than conflict, shapes the future.

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LITERATURE REVIEW

Regional economic integration has long been recognized as a key mechanism for promoting sustainable development, particularly in conflict-affected regions such as the South Caucasus. The crucial role of trade openness and cooperation in driving growth, along with the ongoing expansion of economic blocs, has fueled both theoretical and empirical exploration of the relationship between integration and potential future prosperity (Kizito and Lean 2019).

Researchers such as Nicita (2009) and Falvey et al. (2012) focus on the effects of deeper integration within specific countries or regions, while scholars like Baldwin and Venables (1995) examine the broader role of infrastructure development in facilitating trade relations and economic interdependence. They argue that regional cooperation reduces transaction costs and enhances productivity. Integration into global markets and trade liberalization have long been seen as pivotal drivers of overall economic performance, contributing to increased bilateral trade, reduced intra-household inequality, and higher GDP *per capita* growth (Hadhek and Mrad 2015; Santos-Paulino 2015; Vamvakidis 1998).

Furthermore, Vamvakidis (1998) suggests that regional trade agreements can positively impact growth rates when smaller economies integrate with larger, more developed partners. For the South Caucasus, this implies that the CoP initiative should consider economic incentives for larger economies. Many countries have also embraced trade openness to gain additional insights into production processes (Bas 2012; Ahn et al. 2019; Muazu and Vo 2020), attract foreign investment (Baldwin et al. 1995; Bajo-Rubio et al. 2010; Khalid and Marasco 2019), and leverage economies of scale (Conti 2014).

Infrastructure investments have consistently been linked to sustainable growth, particularly in regions with untapped economic potential. A study by Calderón and Servén (2010) demonstrates that infrastructure quality and accessibility have a significant influence on trade efficiency, market access, and industrial productivity. Similarly, Timilsina et al. (2021) assess the contribution of physical infrastructure to economic growth, concluding that its impact is greater in developing economies. Notably, their study highlights that the efficiency of road infrastructure depends not only on its expansion but also on its optimal utilization.

In a comparable vein, the World Bank (2019) analysis of transport corridors in Central Asia emphasizes how investments in logistics facilitate regional trade. The report highlights that many countries in Central Asia lack adequate infrastructure, emphasizing the need for substantial investment in transport corridors to enhance connectivity. To capitalize on these advantages, nations have adopted varied trade liberalization strategies. Some pursue "going-alone liberalization" (Bhagwati 2002), which involves uniformly reducing customs tariffs across all trade partners, while others implement regional integration by selectively opening markets through reciprocal agreements. Agbetsiafa (2010) suggests that the latter approach enables countries to manage trade liberalization more effectively while mitigating the risks posed by foreign competition.

Trade complementarity reveals potential natural partnerships, as explored by Hosein et al. (2021) and Martincus et al. (2018). The author Chandran (2010) examines trade relationships between India and ASEAN countries, demonstrating that complementary trade structures lead to increased bilateral trade. A World Bank study (2008) investigates regional imports of

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intermediate goods from neighboring countries and their impact on global export performance, emphasizing that complementarity in regional trade can enhance global competitiveness.

In the context of the CoP initiative, trade complementarity modeling indicates that Armenia's potential imports from Türkiye could reach 12.8% of total imports, amounting to approximately USD 678 million (German Economic Team 2022).

However, Copeland (2015) outlines a trade expectations theory, arguing that political regimes are primarily motivated by security concerns rather than economic welfare, social harmony, or ideology. This perspective helps explain why trade agreements, often designed as incentive mechanisms or "carrots," can produce unexpected outcomes when the anticipated economic or political benefits fail to materialize. Such cases underscore the need for comprehensive analyses of the interests of various state and societal actors.

Ultimately, in light of this study's focus and findings, it is crucial to examine the connection between enhanced regional integration and peacebuilding. Clague (2019) emphasizes that economic recovery through increased trade is crucial for maintaining stability in post-conflict countries. Similarly, the UNDP report (2008) and the UN Chronicle article (2024) underline that supporting economic stability and providing essential services are critical to preventing the recurrence of conflict and promoting sustainable development in post-conflict societies. These sources specifically highlight that effective governance and the restoration of livelihoods play a vital role in building trust among communities, thereby laying the groundwork for lasting peace and prosperity.

The principle that economic integration can deliver a peace dividend is also supported empirically. For example, Jrbashyan et al. (2005) note that the eastern regions of Türkiye could particularly benefit from deeper integration with Armenia, as they are approximately 2.5 times less economically advanced than Armenia's national average. This evidence reinforces the CoP initiative's premise: cross-border economic benefits can transcend national boundaries and create conditions conducive to sustainable peace.

Despite extensive literature on this topic, gaps remain regarding post-conflict infrastructure initiatives such as the CoP. Specifically, limited research exists on trade complementarities in the South Caucasus or on the economic modeling of the impacts of border re-opening (German Economic Team 2022). This study addresses these gaps by examining the multifaceted effects of the Crossroads of Peace, highlighting its potential to foster economic growth, enhance regional cooperation, and contribute to long-term peacebuilding. The findings provide valuable insights for policymakers and business practitioners regarding post-conflict regional integration.

METHODS

This study uses a mixed-methods approach combining quantitative trade analysis, econometric modeling, and comparative estimation. Regional trade potential was assessed with 2023 Trade Map data (4-digit HS) using three indicators: Export Similarity Index (ESI) (Finger and Kreinin 1979), Trade Complementarity Index (TCI) (World Bank 2023), and Revealed Comparative Advantage (RCA) (Balassa 1965), measuring export overlap, sectoral complementarity, and competitiveness between Armenia, Türkiye, and Azerbaijan.

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Trade volume determinants were analyzed using a panel regression based on the Gravity Model, covering Armenia's trade with 189 countries (2004–2023) and estimated via Random Effects (Torres-Reyna 2023). Explanatory variables included GDP, distance, urban population, trade bloc membership (EAEU), and EU membership.

For the 2024 Armenia–Türkiye trade forecasts, IMF macroeconomic projections were applied to the regression estimates. In the absence of bilateral tourism data, Georgia served as a proxy to estimate potential tourist flows and expenditures.

INTERNATIONAL TRADE

Due to the absence of historical trade data between Armenia and Azerbaijan, as well as the limited availability of data on Armenia–Türkiye trade, alternative analytical approaches must be employed to anticipate the potential effects of border openings on international trade.

A helpful approach is to analyze how Türkiye and Azerbaijan currently engage in trade with other members of the Eurasian Economic Union (EAEU), of which Armenia is a member. Türkiye, for instance, conducts more than $40 billion in annual trade with EAEU countries such as Russia and Kazakhstan (Observatory of Economic Complexity, OEC 2023). These exchanges are primarily driven by Türkiye's exports of machinery, textiles, and food products, while its imports consist primarily of energy resources, metals, and chemicals. Azerbaijan also maintains active trade ties with the EAEU, primarily through oil and gas exports, while importing machinery and agricultural products.

These trade patterns point to tangible opportunities for Armenia and its neighbors. As a member of the EAEU, Armenia already operates within a shared regulatory framework, which could facilitate the establishment of trade relations with Azerbaijan and Türkiye once borders open. Moreover, Armenia's geographic position offers the potential to serve as a transit hub, linking Türkiye to other EAEU markets.

A closer examination of product-level trade highlights these opportunities. Azerbaijan's (OEC 2023) demand for machinery, vehicles, and processed food products could align well with Armenia's (OEC 2023) emerging manufacturing sector. At the same time, Türkiye's (OEC 2023) industrial output, particularly textiles, household goods, and machinery, could complement Armenia's import needs. Armenia also holds a comparative advantage in specific niche sectors, such as high-quality agricultural goods, including dried fruits, wine, and organic produce, which could attract buyers in both Türkiye and Azerbaijan.

Practical examples from the region suggest this is feasible. Georgia, for instance, conducts more than $2 billion in annual trade with Türkiye and nearly $1 billion with Azerbaijan (OEC 2023), despite its comparatively small economy. This demonstrates that substantial trade volumes can develop even between neighbors with modest markets. By analogy, Armenia could expect similar, if not greater, trade flows following the opening of its borders.

To systematically assess these opportunities, tools such as the Export Similarity Index (ESI), Trade Complementarity Index (TCI), and Revealed Comparative Advantage (RCA) are applied. These indices help identify the degree of overlap and complementarity in the export and import structures of Armenia, Azerbaijan, and Türkiye, thereby revealing both the competitive and cooperative dimensions of potential trade relations. The results of this analysis are presented in the text below.

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Export Similarity Index

The Export Similarity Index (ESI), developed by Finger and Kreinin (1979), measures the degree of overlap between Armenia's export structure and the combined export structure of Türkiye and Azerbaijan. By comparing the share of each product in the respective export baskets, the ESI indicates whether these economies are likely to compete in the same international markets or complement each other. The index is calculated using the Export Similarity Index formula:

$$ESI_{ij} = \sum_{i}^{n} min(x_{ik}/X_i), (x_{jk}/X_j)$$

Where:

- x_{ik} the value of exports of product k by country i (Armenia).
- X_i the total exports of country i (Armenia).
- x_{jk} the value of exports of product k by country i (Türkiye and Azerbaijan combined).
- X_j the total exports of country i (Türkiye and Azerbaijan combined).

The index ranges from 0 to 1, where 0 indicates no overlap in export structures and 1 indicates perfect overlap. The analysis uses observed data from 2023 trade statistics at the 4-digit HS code level (Observatory of Economic Complexity, OEC) to ensure greater accuracy.

Following the calculations, the Export Similarity Index (ESI) for Armenia and the combined region of Türkiye and Azerbaijan was found to be 0.25. This relatively low value reflects a diversified export structure between Armenia and the region, indicating minimal direct competition in export markets. Such a pattern highlights opportunities for complementary trade relationships, allowing each country to leverage its unique export strengths to enhance trade cooperation and foster deeper economic integration within the South Caucasus.

Trade Complementarity Index

The Trade Complementarity Index (TCI) was calculated to assess the degree of alignment between Armenia's export patterns and the import needs of Türkiye and Azerbaijan. This widely used metric evaluates how well one country's exports complement another country's imports, offering insights into the potential for enhanced bilateral trade. The TCI can also highlight specific sectors where trade relations could be strengthened. The index ranges from 0 to 1, with values closer to 1 indicating high complementarity and values near 0 indicating low complementarity. For this study, trade data from 2023 at the 4-digit HS code level were used to ensure accuracy. The index was calculated using the Trade Complementarity Index formula:

$$\boldsymbol{TCI = 1 - (1/2) \times \Sigma \left| (X_{cg}/X_c) - (M_{rg}/M_r) \right|}$$

Where:

- X_{cg} represents the exports of product g by Armenia.
- X_c is Armenia's total exports.

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- M_{rg} is the combined imports of product g by Türkiye and Azerbaijan.
- M_r is the total combined imports of Türkiye and Azerbaijan.

After applying the TCI formula to Armenia's exports (retrieved from TradeMap 2023) in relation to Türkiye's and Azerbaijan's imports, as well as to the reverse scenario, Türkiye's and Azerbaijan's combined exports in relation to Armenia's imports, the following results were obtained:

- TCI from Armenia to the Region (Türkiye and Azerbaijan): 0.3
- TCI from the Region (Türkiye and Azerbaijan) to Armenia: 0.5

A TCI of 0.3 from Armenia to the region suggests that there is some overlap between Armenia's exports and the import needs of Türkiye and Azerbaijan, but the alignment is relatively weak. This suggests moderate potential for beneficial trade, while highlighting the need for further alignment or diversification of Armenia's export portfolio to enhance trade prospects.

Conversely, a TCI of 0.5 from the region to Armenia indicates a higher degree of complementarity between Türkiye's and Azerbaijan's exports and Armenia's import needs, suggesting stronger trade opportunities for the region's exports to Armenia.

The results of the TCI analysis are significant for all parties involved. For Armenia, understanding its alignment with the region's import structure allows policymakers and businesses to target sectors with strong trade potential. Likewise, Türkiye and Azerbaijan can focus on exporting goods that are in high demand in Armenia, enhancing the prospects for mutual trade benefits. Emphasizing key industries where complementarity is strongest is crucial, as sectors with higher alignment offer immediate opportunities for trade expansion. By prioritizing these sectors, policymakers can facilitate faster gains from trade. Conversely, in areas with lower complementarity, efforts could be directed toward adjusting production or exploring new markets, either through diversification or policy-driven trade initiatives.

High-potential sectors identified through the TCI analysis:

- **Armenia → Region:** Apparel and clothing accessories (HSN 62), Electrical energy (HSN 2716), and Ores, slag, and ash (HSN 26).
- **Region → Armenia:** Motor vehicles for the transport of ≥10 persons (HSN 8702), Bars and rods of iron and steel (HSN 7214), and Furniture and parts thereof (HSN 9403).

The results from the TCI analysis are significant for all parties involved. For Armenia, understanding its alignment with the region's import structure enables policymakers and businesses to target sectors with strong trade potential. Similarly, Türkiye and Azerbaijan can focus on exporting goods in high demand in Armenia, improving the prospects of mutual trade benefits.

Given that the complementarity levels are moderate, there is substantial potential to enhance trade relationships by concentrating on sectors with higher complementarity and by fostering trade through economic cooperation and diversification strategies.

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Revealed Comparative Advantage

The Revealed Comparative Advantage (RCA) was calculated for Armenia, Türkiye, and Azerbaijan based on their top three export products. Developed by Balassa (1965), the RCA measures whether a country has a relative advantage or disadvantage in producing a particular good compared to the rest of the world. An RCA value greater than 1 indicates that the country possesses a comparative advantage in that product. The index was calculated using the Revealed Comparative Advantage formula:

$$\boldsymbol{RCA} = (\boldsymbol{X_{ij}} / \boldsymbol{X_{it}}) / (\boldsymbol{X_{wj}} / \boldsymbol{X_{wt}})$$

Where:

- X_{ij} is the export of product *j* by country *i*.
- X_{it} is the total exports of country *i*.
- X_{wj} is the world export of product *j*.
- X_{wt} is the total world exports.

The results of the RCA calculations of the RCA calculations are as follows:

Table 1: Armenia's Top Three Export Products Compared to Türkiye and Azerbaijan (Source: Trade Map 2023)

HS Code	Description	RCA Armenia	RCA Türkiye	RCA Azerbaijan
71	Precious metals, jewelry	10.30	1.43	0.13
85	Electrical machinery	0.79	0.40	0.01
26	Ores, slag, and ash	6.61	0.55	0.04

From Table 1, it is evident that Armenia holds a higher comparative advantage in its top three export products compared to Türkiye and Azerbaijan. In particular, Armenia exhibits the most decisive advantage in precious metals and ores, highlighting its relative specialization and competitive edge in these sectors.

Table 2: Azerbaijan's Top 3 Products vs. Armenia's Top 3 Products (Source: Trade Map 2023)

HS Code	Description	RCA Azerbaijan	RCA Armenia
27	Mineral fuels, oils	6.72	0.07
8	Edible fruit and nuts	2.49	0.95
39	Plastics	0.44	0.15

Similarly, Table 2 shows that Azerbaijan holds a higher comparative advantage in its top three export products. In particular, the country exhibits the most decisive advantage in edible fruits and mineral fuels, underscoring its specialization and competitive edge in these sectors.

Table 3: Türkiye's Top Three Export Products Compared to Armenia's (Source: Trade Map 2023)

HS Code	Description	RCA Türkiye	RCA Armenia
87	Vehicles	1.50	0.77
84	Machinery, boilers	0.90	0.05
27	Mineral fuels, oils	0.47	0.27

While Türkiye demonstrates only a moderate comparative advantage in its top three exported products, its figures remain substantially higher than Armenia's performance in the global market (see Table 3). This RCA analysis highlights that Armenia possesses substantial comparative advantages in specific sectors where Türkiye and Azerbaijan exhibit weaker positions. Conversely, Azerbaijan and Türkiye also maintain specific sectors of decisive advantage.

Focusing on sectors where each country holds pronounced comparative strengths can significantly enhance regional trade potential. Moreover, specific products, such as edible fruits and nuts, emerge as promising areas for future trade between Armenia and Azerbaijan, due to the high competitiveness of both countries in these categories.

DETERMINANTS OF TRADE VOLUME: A PANEL DATA ANALYSIS OF ARMENIA-TÜRKIYE TRADE

The authors of this study investigate the factors influencing Armenia's trade volume with 189 countries over the period 2004–2023 using panel data regression techniques. The analysis applies the theoretical framework of the Gravity Model of trade (Egger 2002, 5), which posits that bilateral trade flows are positively related to the economic sizes of the trading partners and negatively related to the geographic distance between them. Beyond these core determinants, the study also incorporates the roles of urban population, trade agreements, and EU membership in shaping trade patterns.

The dataset includes the following economic and trade-related variables:

- Defined as the sum of exports and imports between Armenia and its trading partners, obtained from Trade Map, which provides detailed trade flow data. The dataset spans 189 countries from 2004 to 2023, enabling a comprehensive longitudinal analysis of Armenia's trade patterns.
- Data on Armenia's GDP and its trading partners, as well as urban population figures (measured as the number of people residing in urban areas), were sourced from the World Bank's Open Data platform.
- Calculated as the distance between Yerevan and the capitals of Armenia's trading partners, serving as a proxy for geographic trade costs.
- Information on free trade agreements (FTAs) and Armenia's membership in regional economic blocs was collected from the WTO Regional Trade Agreements Database.
- Data on the Eurasian Economic Union (EAEU) were obtained from the official EAEU website. At the same time, information on EU Member States was sourced from the European Union's official enlargement webpage (European Union official website, History of enlargement).

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The Random Effects (RE) model was selected to account for unobserved country-specific heterogeneity, assuming these effects are uncorrelated with the regressors. It is suitable for large panels with repeated observations, like the dataset used here. The model is specified as follows:

$$\ln(\text{TradeVolume}) = \beta_1 \ln(\text{GDP}) + \beta_2 \ln(\text{Armenia's GDP}) + \beta_3 \ln(\text{Distance}) + \beta_4 L1.\ln(\text{Urban}) + \beta_5 \text{TradeBloc} + \beta_6 \text{EU} + u_i + \epsilon_{it}$$

Where:

- u_i represents the unobserved country-specific effect, capturing factors unique to each country such as culture, history, and formal institutions.
- ϵ_{it} is the idiosyncratic error term, accounting for random shocks and measurement errors not explained by the model.

Unlike other panel data models, which control for time-invariant differences by allowing each entity to have its own intercept, Random Effects (RE) models assume that the unobserved individual effects are random and uncorrelated with the explanatory variables. This assumption allows for the inclusion of time-invariant variables, such as geographic distance, in the model, which is particularly important in trade studies (Torres-Reyna 2007).

Regression Results and Interpretation

The estimated Random Effects model produces the following equation for Armenia's trade volume:

$$\ln(\text{Trade Volume}) = 1.28 \ln(\text{GDP}) + 1.69 \ln(\text{Armenia's GDP}) - 1.65 \ln(\text{Distance}) + 0.57 L1.\ln(\text{Urban}) + 3.97(\text{TradeBloc}_1) + 3.78(\text{TradeBloc}_2) + 1.81(\text{EU}) + u_i - 54.49$$

Attention is now directed to the interpretation of the model's coefficients, focusing on the manner in which each factor affects Armenia's trade volume:

- Economic size plays a significant role in determining the volume of trade. The coefficient for partner country GDP (β=1.28, p<0.01\beta = 1.28, p<0.01β=1.28, p<0.01) indicates that a 1% increase in a partner country's GDP leads to a 1.28% increase in trade volume, a statistically significant effect at the 1% level. Similarly, Armenia's GDP (β=1.69, p<0.01\beta = 1.69, p < 0.01β=1.69, p<0.01) exerts a strong positive influence, suggesting that as Armenia's economy grows, its overall trade expands.
- Distance has a negative and highly significant effect (β=−1.65, p<0.01\beta = -1.65, p<0.01β=−1.65, p<0.01), confirming that countries located farther from Armenia trade substantially less, consistent with the predictions of the Gravity Model.
- Urban population, included with a one-year lag (β=0.57, p<0.05\beta = 0.57, p<0.05β=0.57, p<0.05), also exhibits a significant positive impact. The lagged effect indicates that as urban areas expand, improvements in infrastructure, logistics, and market accessibility gradually enhance trade flows.
- Membership in a trade bloc significantly boosts trade volume. Countries with a free trade agreement (FTA) but not in the EAEU experience trade volumes 3.97 times higher (p<0.1p < 0.1p<0.1) than non-members. Countries participating in both an FTA and the

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EAEU show a slightly lower, yet still significant effect, with trade volumes 3.78 times higher (p<0.01p < 0.01p<0.01).

- EU membership also has a statistically significant effect (β=1.81, p<0.01\beta = 1.81, p<0.01β=1.81, p<0.01), indicating that membership in the EU is associated with an 81% increase in trade volume, highlighting the strong economic integration between Armenia and European markets (Policy Trade Europe 2025).

Model Performance and Statistical Tests

The overall R^2 value of 0.6362 indicates that the model explains 63.62% of the variation in trade volume across countries and years. The between-country R^2 of 0.7657 suggests that differences between countries account for 76.57% of the variation in trade volume.

Several statistical tests were conducted to validate the model:

- Breusch-Pagan Lagrange Multiplier Test (Panel Effect Test):
  - Test result: $\chi^2(1) = 7173.47$, p = 0.000
  - Conclusion: Confirms that a Random Effects (RE) model is more appropriate than OLS.
- Heteroskedasticity Test:
  - Test result: $\chi^2(1) = 316.26$, p = 0.000
  - Conclusion: Heteroskedasticity is present; therefore, robust standard errors were used.
- Variance Inflation Factor (VIF) – Multicollinearity Test:
  - Mean VIF = 2.36
  - Conclusion: No severe multicollinearity detected.

Based on the estimated Random Effects model, we will now use the following equation to predict Armenia's trade volume with Turkey for 2024:

$$Volume_{predicted} = e^{(1.28\times28.92+1.69\times23.29-1.65\times6.90+0.57\times18.70+3.97\times0+3.78\times0+1.81\times0-54.49+u_i)} - 1$$

Where:

- Türkiye's GDP in 2024 (IMF forecast): $1,344.3 billion (ln(1,344,300,000,000) = 28.92)
- Armenia's GDP in 2024 (IMF forecast): $24.08 billion (ln(24,080,000,000) = 23.29)
- Distance between Yerevan and Ankara: 992.15 km (ln(992.15) = 6.90)
- Urban population of Türkiye in 2023 (World Bank): 66.1 million (ln(66,096,052) = 18.70)
- Türkiye's trade agreement status with Armenia: No FTA or EAEU membership (TradeBloc1 = 0; TradeBloc2 = …)
- EU membership status: Türkiye is not an EU member (EU = 0)
- u_i Unobserved country-specific effect (Baltagi 2005, 11)

Based on this estimation, Armenia's predicted trade volume with Türkiye in 2024 is approximately USD 787 million, assuming Türkiye maintains trade patterns similar to those with other countries.

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The model cannot forecast trade volume between Armenia and Azerbaijan due to the lack of historical trade data between the two countries. Since no recorded trade flows exist in the dataset for Azerbaijan between 2004 and 2023, the model is unable to estimate a country-specific effect, making a reliable prediction infeasible.

While trade potential with Türkiye can be estimated based on available sectoral and regional data, the absence of historical trade between Armenia and Azerbaijan highlights the enduring legacy of division in the South Caucasus. Nevertheless, the newly opened borders and ongoing normalization efforts create the conditions for transformative change, not only in trade but also in the movement of people. As barriers to travel are removed, the experience of neighboring countries suggests substantial opportunities for Armenia to benefit from increased cross-border tourism. Assessing these opportunities requires a careful comparative approach, drawing on Georgia's experience as a regional analogue to project potential tourism flows and their economic impact.

TOURISM

Since there is no historical data on tourism figures from Azerbaijan and Türkiye to Armenia, the potential impact of opening the land borders was estimated using Georgia as a reference. Georgia shares cultural, economic, and geographical similarities with Armenia and has direct land borders with both Azerbaijan and Türkiye, making it a suitable comparator.

According to the National Statistics Office of Georgia, approximately 1.4 million Turkish nationals visited Georgia in 2023. In contrast, just over 12,000 Turkish nationals visited Armenia in the same year, according to the Statistical Committee of the Republic of Armenia (2023). It is important to note that the only current route for Turkish nationals to visit Armenia is via flights from Istanbul, as there are no open land borders between the two countries.

In 2023, approximately 200,000 nationals from Azerbaijan visited Georgia (National Statistics Office of Georgia, 2023, Tourism Statistics). However, due to the absence of diplomatic relations, no Azerbaijani nationals have visited Armenia for many years. If the land borders were opened and diplomatic relations restored, the number of visitors from Türkiye and Azerbaijan would not immediately reach the figures seen in Georgia. Nevertheless, over a period of 5 to 10 years, tourism from these countries could potentially approach similar levels, thereby enhancing people-to-people diplomacy, fostering cross-cultural understanding, and supporting peacebuilding efforts.

According to the Tourism Committee of Armenia, tourists spend an average of approximately $776.90 per visit (Tourism Committee of RA 2023). Assuming Armenia initially attracts 20% of the total number of Turkish and Azerbaijani tourists who visit Georgia, this could result in an estimated $250 million increase in tourism revenue, contributing positively to Armenia's GDP and overall economy. As familiarity with the newly opened borders grows and neighborly relations strengthen, this number is expected to rise over time (Carril-Caccia et al. 2022).

Conversely, Armenian tourists spend around $880 per trip abroad, according to the International Visitors Survey conducted by the Tourism Committee of Armenia in collaboration with the World Bank (Tourism Committee of RA, International Visitor Survey 2023). If similar numbers of Armenian tourists visit Türkiye and Azerbaijan as they do Georgia, Türkiye could see

an additional $246 million in tourism revenue. In comparison, Azerbaijan could gain approximately $35 million (author's estimate based on the above-mentioned data).

It is also important to contextualize how these multidimensional factors translate into actionable opportunities for regional development, particularly through the lens of people-to-people diplomacy and cross-border tourism. By quantifying potential gains in tourism flows between Armenia, Türkiye, and Azerbaijan, this study illustrates how improved political relations and modernized infrastructure can directly contribute to economic growth and social cohesion. As border openings facilitate greater movement, economic activity is amplified—not only through substantial increases in tourism receipts and ancillary service industries but also through the strengthening of cross-cultural understanding and peacebuilding mechanisms. Over time, the normalization of travel and trade practices between neighboring countries, supported by sustained technological advances and international partnerships, can transform the South Caucasus from a zone of division into a region characterized by openness, prosperity, and lasting stability. This integrated approach ensures that the Crossroads of Peace initiative leverages political will, economic strategy, social connectivity, and technological modernization to maximize its impact at both the state and societal levels.

PEST ANALYSIS

This study employs the Political, Economic, Social, and Technological (PEST) framework to provide insights into the broader regional dynamics and global trends that shape the project's outcomes. By analyzing these dimensions, the study identifies key opportunities and challenges that could influence the initiative's implementation and long-term strategy.

Factor	Key Insights	Opportunities / Impacts
Political	Success depends on easing historical tensions and establishing cooperative frameworks among Armenia, Türkiye, and Azerbaijan. Stable political environments support reliable border crossings and transport networks.	Open corridors reflect commitment to mutual growth. International support mitigates risks. US-brokered 2025 peace agreement accelerates diplomatic normalization.
Economic	Aligns with global trends of supply chain resilience and trade diversification. Infrastructure investments have high multipliers (1 USD → 1.5 USD economic return).	Increased trade, tourism, and industrial cooperation. Reduced transaction costs, attracted FDI, and integrated into global value chains—leverages comparative advantages in agriculture, energy, and manufacturing.
Social	Infrastructure improves cross-border movement, tourism, and cultural exchange. Fanyan and Petrosyan (2024) estimate a potential annual trade increase of USD 2.0–2.4 billion.	Promotes people-to-people connections and sustainable peace. Tourism, business, and academic exchanges strengthen social cohesion. The TRIPP corridor increases trade potential.
Technological	Advanced transport/logistics technology improves customs efficiency, enables real-time monitoring, and enhances railway management. Digitalization lags behind the Baltic states (LPI 2.6 vs 3.5).	Enhanced operational efficiency, faster trade flows, and smart logistics investment. Strengthens regional competitiveness in a digitized global economy.

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The Crossroads of Peace initiative relies on a complex interplay of political, economic, social, and technological factors that collectively determine its prospects for success. Politically, the project's viability is closely tied to resolving historic animosities and establishing frameworks for cooperation among Armenia, Türkiye, and Azerbaijan. Creating stable, cooperative political environments is crucial to ensuring the reliability of border crossings and transportation networks across the region. The opening of corridors signals a genuine commitment to mutual growth and is reinforced by international support, which helps mitigate risks associated with unresolved tensions. The US-brokered 2025 peace agreement, initialed in Washington, has accelerated diplomatic normalization, creating a context conducive to sustainable cross-border engagement.

Economically, the Crossroads of Peace aligns with global trends that aim to enhance supply chain resilience and diversify trade pathways. Substantial investments in infrastructure are expected to generate significant economic multipliers, with every US dollar invested returning approximately USD 1.50 in economic benefits. The ripple effects are extensive: increased trade and tourism, deeper industrial cooperation, and reduced transaction costs all contribute to greater integration into global value chains. The project leverages the region's comparative advantages, particularly in agriculture, energy, and manufacturing, making the South Caucasus more attractive to foreign direct investment and strengthening its potential as a pivotal commercial hub.

From a social perspective, new and upgraded infrastructure promises to significantly enhance cross-border mobility, tourism, and cultural interaction. Assessments by Fanyan and Petrosyan (2024) estimate that regional trade could increase by USD 2.0–2.4 billion annually due to the initiative. These developments are expected to foster deeper people-to-people connections, which in turn underpin sustainable peace. Expanded opportunities for tourism, commerce, and academic exchange will help forge new social ties and reinforce cohesion within and between communities. The TRIPP corridor, in particular, increases regional trade potential, serving as a tangible pathway to greater interconnectedness and shared prosperity.

Technologically, the initiative incorporates advanced transport and logistics systems that enhance efficiency at borders through improved customs management, real-time monitoring, and smarter railway operations. However, the process of digitalization still lags behind leading benchmarks; the region's Logistic Performance Index (LPI) stands at 2.6 compared to 3.5 for the Baltic States. Continued investment in digital solutions is crucial for enhancing operational effectiveness, streamlining trade flows, and enabling the region to compete in an increasingly digitalized global economy. Smart logistics and technological upgrades will help the South Caucasus not only catch up but also establish itself as a hub of digital-era commerce.

In summary, the Crossroads of Peace presents a wide range of opportunities. For example, it can transform historic fault lines into bridges for growth, deepen economic and social integration, and elevate the South Caucasus' role in global supply chains. The initiative's success, however, depends on addressing political legacies, harnessing economic multipliers, nurturing social linkages, and investing in digital infrastructure to ensure sustainable, long-term regional competitiveness and cooperation.

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CONCLUSION

The Crossroads of Peace (CoP) initiative aims to transform the South Caucasus into a regional trade hub and a model for economic cooperation in conflict-affected areas. Building on decades of scholarly and policy research on trade and regional integration, targeted investments in railways, border checkpoints, and tourism infrastructure offer Armenia, Türkiye, and Azerbaijan a real opportunity to develop robust commercial ties that transcend political boundaries.

This study demonstrates that re-opening existing routes and introducing new roads can unlock channels for goods, services, and people, boosting the region's global connectivity. The TCI analysis identifies Armenia's high-potential sectors as apparel and clothing accessories, electrical energy, and ores, slag, and ash. For countries in the region exporting to Armenia, the top sectors include motor vehicles for transporting ten or more people, iron and steel bars and rods, and furniture and its parts. Moreover, the Export Similarity Index for Armenia and the region (Türkiye and Azerbaijan) is 0.25, highlighting significant potential for trade complementarity. While limitations in available data prevented modeling trade volume between Armenia and Azerbaijan, the predicted trade volume between Armenia and Türkiye is estimated at USD 787 million, indicating substantial growth potential.

As the South Caucasus becomes increasingly interconnected, economic interdependence can act as a stabilizing force, reducing incentives for conflict and fostering long-term stability and freedom of movement for the region's populations. If trust is rebuilt, trade and tourism can drive cross-cultural exchange and shared prosperity across former dividing lines. A cornerstone of the Crossroads of Peace vision is the restoration of genuine freedom of movement for the peoples of the South Caucasus, a region historically constrained by closed borders and entrenched political divisions.

The gradual removal of barriers between Armenia, Türkiye, and Azerbaijan promises to facilitate the movement of people, goods, and services, enabling workers to access new job opportunities across borders and allowing students and tourists to participate in a more vibrant regional exchange. The implementation of internationally standardized procedures for customs, vehicle, and passenger transit, guided by principles of national sovereignty and reciprocal access, can provide secure, predictable, and non-discriminatory passage, which is essential for both humanitarian and economic development.

In this context, freedom of movement becomes more than a technical arrangement: it is a practical mechanism for building trust. Cross-border mobility allows societies to transition from mutual suspicion toward mutual benefit and shared prosperity. Expanding personal and commercial travel reduces incentives for isolationism, fosters cross-cultural understanding, and promotes peace through everyday experiences. Over time, sustained access and openness are likely to lower the socio-economic costs of fragmentation, laying the groundwork not only for incremental integration but also for a transformative shift in the collective identity and stability of the South Caucasus.

The success of CoP relies on strategic policymaking in conjunction with infrastructure development. Policymakers must ensure that newly opened corridors are supported by complementary trade frameworks, enabling businesses to leverage emerging opportunities fully.

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The gradual liberalization of trade relations between Armenia, Türkiye, and Azerbaijan will enable commerce to adapt to new realities and maximize benefits for all parties.

Beyond regional gains, CoP aligns with global trends in trade integration and supply chain diversification. The South Caucasus is strategically positioned to serve as a critical transit point between Europe, Asia, and the Middle East, enhancing its appeal for investment and strengthening its role in resilient supply chains.

CoP represents not only an economic initiative but a strategic vision for a more prosperous and interconnected future. Armenia, Türkiye, and Azerbaijan have an opportunity to move from division to cooperation. While these dynamics will not emerge overnight, each incremental step toward collaboration brings the region closer to a future founded on practical benefits and the economic well-being of its population.

Ultimately, the CoP's success depends on a sustained commitment from all stakeholders, including investing in infrastructure, supporting cross-border cooperation, and aligning economic objectives with the broader pursuit of peace. Through these efforts, the South Caucasus can achieve lasting growth and stability, offering tangible evidence of the power of collaboration over division. With continued commitment, the region can become a beacon of cooperation, providing lessons in economic integration and peaceful coexistence that extend far beyond its borders.

Limitations of the Study

Several limitations should be acknowledged. The absence of official trade data between Azerbaijan and Armenia prevents a precise estimation of Azerbaijan's trade potential within the regression model. To partially address missing historical tourism data, Georgia's statistics were used as a proxy, offering a transparent basis for estimating future tourism flows.

Economic modeling in conflict-prone regions faces broader challenges. Factors such as geography, infrastructure, historical ties, market conditions, and institutional frameworks all shape trade dynamics. Non-tariff barriers, logistical challenges, and sector-specific trade potential are difficult to quantify due to the region's complexity.

Political and security considerations also limit the scope of the analysis. While open borders create economic opportunities, diplomatic realities, regulatory frameworks, and public perceptions continue to influence trade patterns. Sustainable integration depends on trust, stability, and cooperation among all parties.

Despite these constraints, CoP envisions regional connectivity that extends beyond immediate economic gains, emphasizing trade, infrastructure, and collaboration as foundations for long-term stability and growth in the South Caucasus.

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CRediT AUTHOR STATEMENT

Gevorg Papoyan: conceptualization, validation, writing – review and editing, supervision, project administration, investigation. **Albert Hayrapetyan**: methodology, software, validation, formal analysis, investigation, resources, data curation, writing – original draft.

All authors have read and agreed to the published version of the article.

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Accessing Foreign Policy Information in the Digital Age: Evidence from Greece

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Abstract
The digitalization of governance and media has increased the visibility and accessibility of foreign policy, reshaping how citizens engage with international affairs. However, limited research exists on how digital platforms influence the way foreign policy information is accessed and evaluated in specific national contexts. This study addresses this gap by examining the case of Greece. Drawing on a nationwide online survey conducted in February 2024 (N = 800), this analysis investigates citizens' source preferences, perceptions of credibility, and engagement patterns across socio-demographic groups. The findings reveal that digital platforms have emerged as the dominant sources of foreign policy information. Nevertheless, traditional dynamics of political polarization, selective trust, and fragmented media consumption remain prevalent. These results underscore the constraints of digitalization in expanding democratic participation and highlight the need for foreign policy research and practice to pay greater attention to public opinion and societal dynamics.

Keywords
Digitalization; Foreign Policy; Public Opinion; Greece; Media; Political Polarization; Democratic Participation

INTRODUCTION

Over the past decade, foreign policy has gained greater public visibility due to the digitalization of governance and the growing use of digital platforms by citizens to access and discuss political issues. While the extent and pace of digitalization have varied across countries, the overall process has led to greater public access, the proliferation of publicly available content, and the emergence of new actors and mediums (Adesina 2017; Bjola and Manor 2022). According to Baum and Potter (2008, 2019), these developments can be characterized as structural transformations towards a digitalized "foreign policy market," where outcomes are increasingly shaped by the distribution of information among decision-makers, traditional and social media, and the public. In this context, information functions as a strategic commodity, influencing policy by shaping public awareness, guiding media agendas and framing interactions between political actors and society (Rhee, Crabtree, and Horiuchi 2024).

This transformation has also reshaped information environments across the Balkans. Between 2020 and 2023, internet penetration in the region increased significantly, ranging from 75% to 96%, depending on the country (BIRN 2023, 6). In Serbia, Montenegro and Kosovo, internet usage now exceeds 90%, with the majority of citizens using digital platforms to access news and political content (Tintor et al. 2022, 10). In Bulgaria, internet usage reached 84% of the population by early 2024, while in the same year, 87% of the population in North Macedonia was online (Kemp 2024).

On the one hand, these statistics suggest that digitalization has become a progressively influential factor in regional politics, reshaping how national foreign policy markets operate. On the other hand, they also demonstrate regional potential for realizing the theoretical benefits of digitalization by promoting more balanced information structures, characterized by the dissemination of factual information, active public scrutiny, elite competition, and greater citizen influence (Kemp 2024). By contrast, however, most Balkan countries failed to achieve these ideal outcomes, instead developing more asymmetric configurations in which political polarization, media fragmentation and information manipulation granted policymakers greater flexibility to shape foreign policy agendas (Valchanov et al. 2022; Ilić and Markov 2024; Tzifakis and Vasdoka 2025).

Although Greece has undergone distinct historical developments compared to its Balkan neighbors, its information environment has traditionally followed asymmetric patterns (Hallin and Mancini 2004; Papathanassopoulos 2013; Tsirigotis 2023). The Greek media system has been characterized by political parallelism, clientelism, weak regulatory oversight, and limited journalistic independence (Iosifidis and Boucas 2015; Kalogeropoulos, Rori, and Dimitrakopoulou 2021). These general frameworks have also shaped foreign policy coverage, which has reflected political divisions and instrumentalized public concerns, particularly over regional disputes involving the Aegean Sea, Cyprus, North Macedonia and Albania. Debates in the traditional Greek foreign policy market have thus reflected domestic political dynamics and tended to disregard balanced reporting and evidence-based analysis, ultimately resulting in a credibility deficit and widespread public distrust (Frangonikolopoulos 2007; Pleios and Frangonikolopoulos 2013). Digitalization, despite its democratic potential, has been unable to alter these underlying trends. While it has broadened the range of accessible sources and diminished the influence of traditional media gatekeepers, it has also exacerbated structural shortcomings in the Greek information landscape. According to recent studies, digital platforms have replicated existing political divisions, created online echo chambers, and limited meaningful engagement with foreign policy through user-generated and algorithm-driven content (Kalogeropoulos and Dimitrakopoulou 2021; Avraam, Veglis, and Dimoulas 2022).

As the digital space plays an increasingly significant role in shaping public opinion and decision-making, research must examine how citizens obtain information about international affairs. This objective is particularly relevant in the Greek context, where existing studies have provided findings on how foreign policy was framed and disseminated in the traditional media environment (Frangonikolopoulos 2007; Pleios and Frangonikolopoulos 2013), but have drawn limited conclusions regarding the impact of digitalization.

This paper seeks to address this gap by examining how the Greek public acquires information on foreign policy, with particular emphasis on the role of digitalization. The analysis is structured around three principal research questions. First (Q1), what are the primary and most contemporary sources of foreign policy information for the Greek public? Second (Q2), to what extent has digitalization transformed traditional patterns of information consumption? Third (Q3), how do socio-demographic variables shape these patterns?

To address these questions, the paper first outlines relevant theoretical frameworks and examines traditional patterns of foreign policy information gathering in Greece. These sections provide the contextual background for the presentation of the empirical findings, which are based on an N = 800 opinion poll conducted between February 2 and 14, 2024, designed to

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map the public's engagement with foreign policy information. The results are then analyzed in the discussion section, which maps the Greek public's patterns of information gathering on foreign policy figures, thereby providing answers to the research questions.

THEORETICAL BACKGROUND: PUBLIC ENGAGEMENT AND INFORMATION-GATHERING IN FOREIGN POLICY

To guide the following stages of the analysis, the theoretical section aims to conceptualize two key aspects of public engagement with foreign policy: public interest in international affairs and the shift in information-gathering patterns from traditional offline channels to digital media. Starting with public interest, the literature presents different perspectives on the extent to which individuals and the broader public are engaged or concerned with international affairs. The division is well illustrated by the split between liberal and realist theories of international relations, with the former arguing for greater public interest and influence in international relations and the latter seeing the state as a unitary entity in which only the elites are concerned and responsible for shaping foreign policy (Waltz 2000; Walt 1998). Radical and constructivist theories also hold different views. While the former argues that the economic order limits the influence of public opinion, constructivism argues that leaders' views on foreign policy reflect domestically embedded social principles (Flockhart 2016).

These contradictory ideas are also reflected in the relevant foreign policy literature. At the beginning of the Cold War, mainstream theories generally followed the realist argument, viewing the public as a marginal aspect of international relations, primarily preoccupied with domestic concerns (Kertzer 2023). The concept was articulated by the Almond-Lippmann consensus, which argued that most voters neither understood nor cared about international developments (Almond 1956, 1960; Holsti 1992; Lippmann 1955). This traditional view was gradually challenged in the late 1960s and early 1970s, when mass protests over foreign policy issues in the United States, France and Czechoslovakia began to shift theoretical principles. The growing influence of transnationalism became a central element of the neoliberal argument, which argued that emerging globalization was integrating new actors into the mainstream of international processes who not only had larger capacities but also a greater interest in understanding and influencing foreign affairs (Nye and Keohane 1971; Rosenau 1980; Burton 1972). The argument was also supported by empirical studies that began to contradict the Almond-Lippmann consensus. These findings suggested that the public is more interested in foreign policy than previously thought and has relatively stable and rational views on foreign affairs (Holsti 1992; Page and Shapiro 1992; Verba et al. 1967).

Public interest in foreign policy has received renewed attention with the emergence of digital foreign policy and diplomacy (Adesina 2017; Bjola 2016; Sotiriu 2015). While the literature recognized that digitalization offered a new abundance of information sources and broader opportunities for engagement, opinions differed on how online platforms affected public interest. Several case studies have demonstrated that digitalization consistently leads to increased political attention, resulting in more informed societies, particularly among those with lower levels of political interest (Mazzoleni and Schulz 1999; Bimber et al. 2015). Others argued that broader engagement opportunities have not increased participation, as information overload, misinformation and the overwhelming nature of digital content have instead led to

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disengagement from digitalised political news (Aalberg, van Aelst, and Curran 2010; Değirmenci 2020). Accordingly, the intermediate proposition emphasized the context-specific character, i.e., it acknowledged that digitalization does not necessarily lead to increased political and foreign policy interests; rather, its impact largely depends on specific societal, community, and individual properties (David 2022; Manor 2019).

Another crucial theoretical question related to public interest is how voters gather information about foreign policy. As in the previous cases, the literature is divided on the issue.

One perspective, rooted in the realist tradition, suggested a top-down model, in which foreign policy views of the public are primarily shaped by political leaders, economic elites, religious and academic figures, media institutions and even external actors (Eichenberg 2016; Efimova and Strebkov 2020). In this view, elites control the framing and dissemination of foreign policy narratives, using their agenda-setting power to shape public understanding (Almond 1956; Lippmann 1955). This power, however, is primarily influenced by the specific context of national political systems. In democratic and pluralistic societies, competing narratives create a more dynamic political environment, while in authoritarian systems, the political leadership can exercise a near monopoly on the dissemination of foreign policy information (Tang 2005; Zimmerman 2002).

In contrast to the top-down model, bottom-up approaches emphasized the role of societal dynamics in the information-gathering process. The model, associated with liberal and constructivist theories, posits that various sources of foreign policy information are available to the public, all of which play a significant role in shaping individuals' perceptions. This pluralist argument proposes that, rather than passively adopting elite-driven narratives, individuals selectively engage with foreign policy information, filtering it through their personal experiences, ideological beliefs, and socio-economic backgrounds (Kertzer and Zeitzoff 2017). While elite narratives remain central to this filtering process, individuals do not simply accept all messages conveyed (Zaller 1992). Instead, their receptivity is shaped by pre-existing attitudes and values, such as education, social status, political affiliation and ideological orientation, which contribute to the diversity of ways in which foreign policy information is gathered and understood (Holsti 1992; Kertzer 2023).

Top-down and bottom-up approaches have had a significant impact on how the literature has viewed digital changes in information-gathering patterns. As noted earlier, Baum and Potter (2008, 2019) viewed the transformation as a significant shift in the foreign policy market. Traditionally, the market was characterized by supply and demand mechanisms for information, which served as a key commodity distributed among decision-makers, media actors and the public. In the offline foreign policy market, information access favored the political elite, who had direct oversight over policy details and were thus able to manipulate the flow of information to the media and the public. As a result, the media acted as a "conveyor belt" that transmitted elite views to the public, enabling decision-makers to influence media narratives (Bennett, Lawrence, and Livingston 2006; Jentleson 1992). Compared to this gatekeeping role, the public entered the foreign policy market with varying degrees of informational disadvantage, gathering information that was framed and distributed by elites and the media (Druckman 2001). In such an offline setting, foreign policy narratives tended to be vertically structured, even in democratic and competitive media environments, where alternative and critical narratives were also shaped by either opposing elites or the press.

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Digitalization has fundamentally altered these traditional patterns by horizontalizing access to news sources and reducing elite control over narratives (Baum and Potter 2019). However, despite initial expectations, this horizontalization did not automatically democratize the information environment. Instead, it has contributed to greater fragmentation and polarization by enabling the proliferation of ideologically driven and politically motivated news sources (Kubin and von Sikorski 2021). This hyper-fragmentation has reinforced selective exposure, limiting citizens' engagement with one-sided perspectives and making public opinion more volatile (Stroud 2011; Prior 2005). Social media algorithms have further exacerbated these trends by amplifying emotionally charged content and reducing incidental exposure to opposing views, thereby fostering ideological isolation (Santos, Lelkes, and Levin 2021; Huszár et al. 2022). As a result, public oversight of foreign policy has weakened, allowing leaders greater flexibility in shaping narratives while reducing democratic accountability. Rather than fostering informed debate, digitalization has made public opinion more fragmented and volatile, reshaping the relationship between the media, public engagement, and foreign policy decision-making (Baum and Potter 2019).

RECENT PATTERNS IN ACCESSING FOREIGN POLICY INFORMATION IN GREECE

Understanding how the Greek public gathers information about foreign policy requires examining both historical traditions and more recent developments. As a starting point, it is essential to note that Greeks have traditionally demonstrated a moderate level of interest in international affairs, but have expressed relatively high concerns regarding regional issues (Balta and Grigoriadis 2024; Triantaphyllou 2018). Bilateral conflicts involving Cyprus, Turkey, North Macedonia, and Albania have not only dominated political discourse (Raptopoulos 2017; Karafotia 2023) but have also been framed as matters of national identity and sovereignty, ensuring their frequent recurrence in media coverage and public debate (Karafotia 2023; Frangonikolopoulos 2007; Pleios and Frangonikolopoulos 2013).

Beyond the immediate neighborhood, persistent domestic debates on security, economic policy and ideological orientation have also maintained public interest in key global actors, including the US, NATO, the Soviet Union/Russia and the EU (Skouroliakou 2012; Iosifidis and Boucas 2015). In recent years, emerging geopolitical developments have extended this interest to countries such as China, Ukraine, Israel, and Libya (Avraam, Veglis, and Dimoulas 2022; Grigoriadis and Tsourapas 2024; Skarpa, Simoglou, and Garoufallou 2023). With these new areas, Greek public interest in foreign affairs can be characterized as multi-layered but focused on regional affairs. To comprehend the foundations of this multi-layered societal interest, it is necessary to examine how foreign policy information is distributed to the public. Historically, the Greek information environment was structured through a top-down configuration in which narratives were generated by the political elite and transmitted to the public through the media system.

Between 1974 and 2009, the political divide between "New Democracy" and "PASOK" played a central role in this process as both parties routinely instrumentalized foreign policy as a means of electoral mobilization and political distraction (Kalogeropoulos, Rori, and Dimitrakopoulou 2021). Both governments and opposition forces frequently employed bilateral disputes to appeal to nationalist sentiments, deflect criticism, and project strength during

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periods of political competition or internal instability. This instrumental use of foreign policy was facilitated by a centralized foreign policy apparatus dominated by the executive branch and reinforced by weak institutional checks and balances (Frangonikolopoulos 2007; Skouroliakou 2012).

In the traditional, offline foreign policy market, these narratives were distributed through the media. As a textbook example of the polarized pluralist model (Hallin and Mancini 2004), the Greek media landscape has been characterized by high levels of political parallelism, intense partisan polarization and limited journalistic autonomy (Papathanassopoulos 2013).

Since 1974, most media outlets have maintained close ties with political parties or business interests, which have influenced editorial positions and the way political and foreign policy issues are presented to the public. These relationships were mutually beneficial: political elites supported media outlets through access to information and state advertising, while the media reproduced elite narratives and shaped public opinion in line with the interests of the parties. However, dissemination was driven not only by political objectives but also by commercial pressures and profit motives (Iosifidis and Boucas 2015). In a relatively small media market, the large number of outlets treated news as a commodity, pursuing profit through sensationalized coverage of bilateral conflicts and the commercial exploitation of national grievances and fears (Kalogeropoulos, Rori, and Dimitrakopoulou 2021). As a result, as Pleios and Frangonikolopoulos (2021) noted, foreign policy coverage often lacked critical analysis and objectivity, focusing instead on ethnocentric narratives that highlighted national victimhood and external threats to boost ratings and serve political interests.

Under the combined influence of political elites and media actors, the public occupied a largely passive and structurally disadvantaged position within the traditional foreign policy information environment. This structure reflected what Baum and Potter (2008) described as a vertically organized system, in which elites and their media allies dominated the flow of information, while information commodities (e.g., foreign policy narratives) were filtered through clientelist channels. Consequently, citizens had limited opportunities to assess or critically influence foreign policy debates. Thus, despite sustained public interest in regional affairs, the structures of traditional foreign policy markets constrained societal participation and kept the information flow insulated from democratic accountability (Druckman 2001; Jentleson 1992).

The vertical structures of the offline foreign policy market have been significantly disrupted by the rise of digital media, which has transformed the way political information is accessed, distributed, and interpreted. According to recent studies, over the past 10–15 years, the Greek information environment has also undergone digitalization, adding new virtual intermediaries such as social media platforms, citizen journalists, and algorithm-driven content to the original triad of political elites, media, and the public (Kacziba, Gibárti, and Lechner 2025; Baum and Potter 2019). While this environment could ideally broaden access to diverse perspectives and reduce elite control over narratives, the Greek case has largely reproduced the limitations of the offline context. As a result, the digital information environment continues to reflect the long-standing structural asymmetries of Greek political communication: it is shaped by political parallelism, limited journalistic autonomy, and entrenched clientelist media networks, which contribute to new forms of fragmentation, public distrust, and algorithmic bias (Iosifidis and Boucas 2015; Kalogeropoulos et al. 2021).

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Despite these well-documented general trends, research remains limited on how digitalization has influenced foreign policy information-gathering patterns and how Greek citizens access and engage with such content online.

The few existing studies on digital foreign policy communication have primarily focused on specific events, such as the Prespa Agreement, the war in Ukraine, or Greek-Turkish tensions, analyzing media framing or political rhetoric rather than patterns of public consumption (Karafotia 2023; Avraam et al. 2022). Their findings indicate that foreign policy content remains emotionally charged and nationalistic, frequently disseminated through unverified or ideologically driven digital channels. Coverage often lacks critical engagement and tends to favor narratives of threat and victimhood, while public exposure is influenced by algorithmic personalization and a fragmented media environment (Pleios and Frangonikolopoulos 2021; Kalogeropoulos et al. 2021).

While these studies have provided analytical insights into specific events, a lack of empirical research remains in systematically mapping how the Greek public consumes foreign policy information in the digital age. Consequently, key questions remain unanswered: Which sources do citizens rely on? How frequently do they engage with foreign policy content? What level of trust do they place in digital versus traditional information providers? To address these gaps, the following section presents findings from an online survey designed to capture patterns of foreign policy information consumption among Greek citizens.

RESEARCH DESIGN AND FINDINGS

The empirical analysis is based on a nationwide online survey conducted between February 2 and 14, 2024, using a self-administered questionnaire. The survey targeted Greek citizens aged 18 and over, with a final sample of 800 respondents. Quotas were applied to ensure representativeness across key demographic variables, including age, gender, educational attainment, and type of residence (urban or rural). Participants were reached through targeted advertisements on Meta platforms and were selected using a randomized process to ensure equal inclusion probability across the adult population. Data collection was conducted by a professional survey company, Fisherman's Online Ltd. (2024), with extensive experience in public opinion measurement. The questionnaire was only available in the Greek language and hosted on a dedicated website, where participants could complete it anonymously. No personal data was requested or recorded that could identify respondents, and no user information was transferred from Meta to the survey platform. The survey aimed to examine how citizens access foreign policy information across both traditional and digital channels, to identify their preferences. It included questions on the frequency of following foreign policy news, preferred sources and platforms, and the perceived credibility of various actors (e.g., politicians, journalists, experts).

Additional items assessed views on the impact of digitalization on democratic participation and the openness of political dialogue in online spaces. Most responses were recorded using three- to five-point Likert-type scales, depending on the structure of each question.

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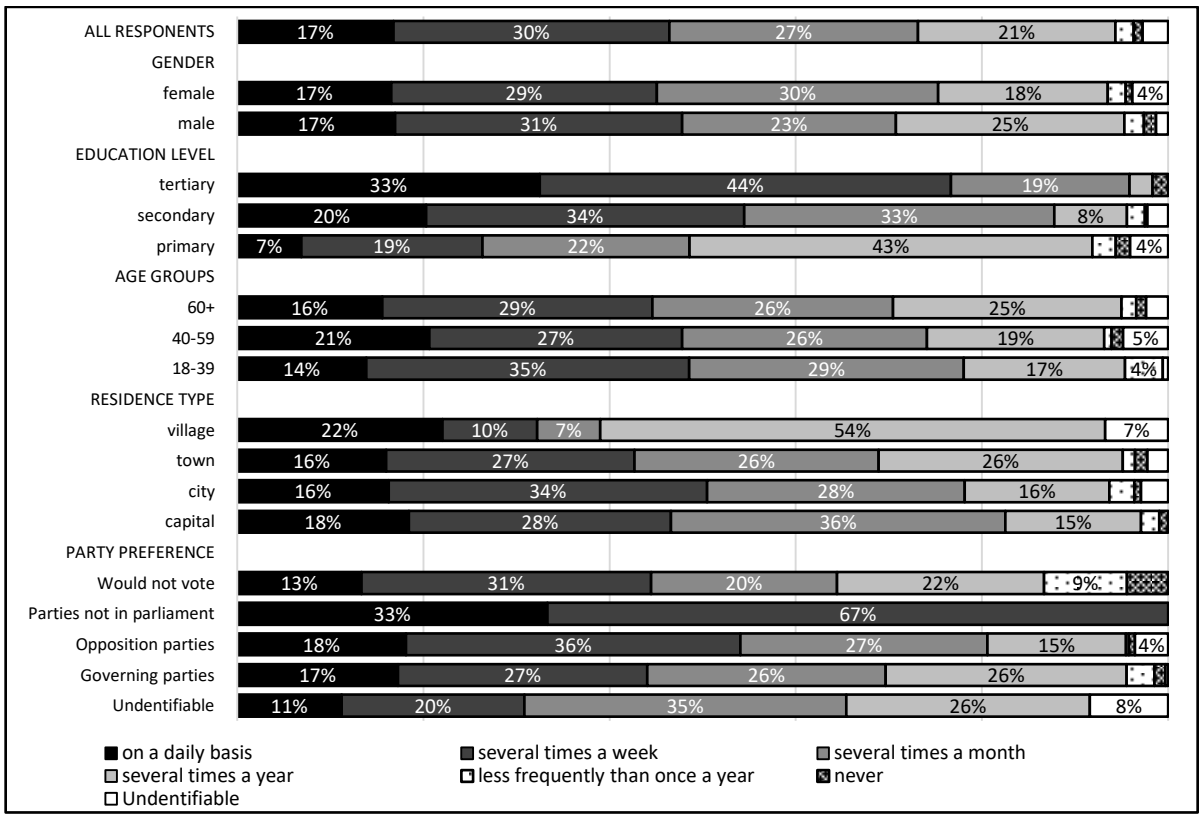
ALL RESPONENTS 17% 30% 27% 21%
GENDER
female 17% 29% 30% 18% 4%
male 17% 31% 23% 25%
EDUCATION LEVEL
tertiary 33% 44% 19%
secondary 20% 34% 33% 8%
primary 7% 19% 22% 43% 4%
AGE GROUPS
60+ 16% 29% 26% 25%
40-59 21% 27% 26% 19% 5%
18-39 14% 35% 29% 17% 4%
RESIDENCE TYPE
village 22% 10% 7% 54% 7%
town 16% 27% 26% 26%
city 16% 34% 28% 16%
capital 18% 28% 36% 15%
PARTY PREFERENCE
Would not vote 13% 31% 20% 22% 9%
Parties not in parliament 33% 67%
Opposition parties 18% 36% 27% 15% 4%
Governing parties 17% 27% 26% 26%
Undentifiable 11% 20% 35% 26% 8%
on a daily basis
several times a week
several times a month
several times a year
less frequently than once a year
never
Undentifiable

Figure 1: To what extent do you stay informed about Greek foreign policy? (Source: Own data collection conducted by Fisherman's Online Ltd. 2024)

Turning to the results, Figure 1 displays the frequency with which Greek citizens followed foreign policy during the sample period, revealing a moderate but uneven pattern of engagement. The most common response was "several times a week" (30%), followed by "several times a month" (27%) and "daily" (17%). Occasional engagement ("several times a year") was reported by 21%, while fewer than 3% followed foreign policy rarely or never. Engagement levels varied across political and demographic groups. Opposition supporters were the most engaged, with 54% following foreign policy at least several times a week, compared to 44% of both government voters and non-voters. Educational background had a strong influence on engagement, with the share of respondents following foreign policy at least weekly declining steadily from those with tertiary education (77%) to secondary education (54%) and primary education (26%). Similar trends are observed across different types of residence, with daily and weekly engagement reaching 46% in the capital and 50% in cities, but dropping to 43% in towns and 32% in villages. Although some variation exists across gender and age groups, the differences are not as significant as those seen by education or place of residence. The results thus indicate that while foreign policy holds a regular place in the information habits of many Greeks, higher engagement is associated with political activity, education, and residence type.

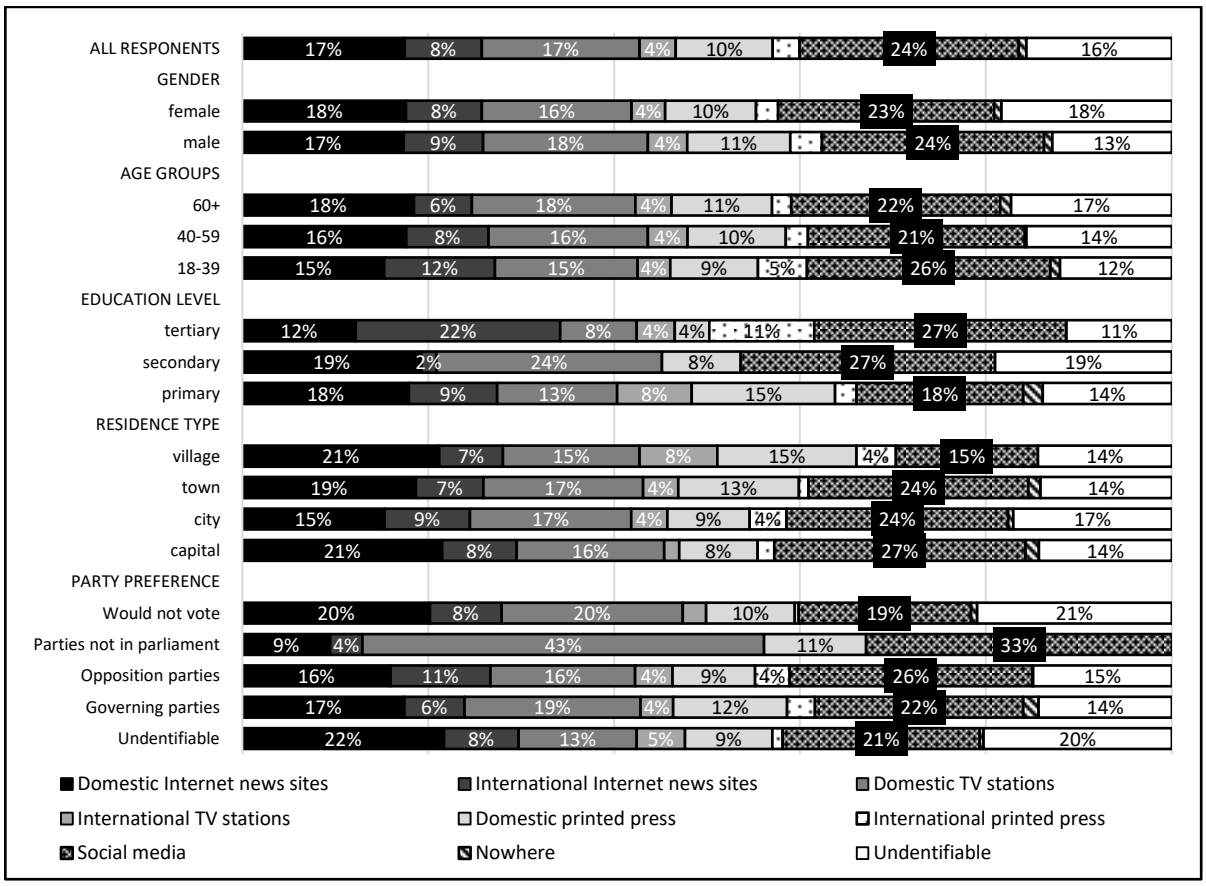
ALL RESPONENTS 17% 8% 17% 4% 10% 24% 16%
GENDER
female 18% 8% 16% 4% 10% 23% 18%
male 17% 9% 18% 4% 11% 24% 13%
AGE GROUPS
60+ 18% 6% 18% 4% 11% 22% 17%
40-59 16% 8% 16% 4% 10% 21% 14%
18-39 15% 12% 15% 4% 9% 5% 26% 12%
EDUCATION LEVEL
tertiary 12% 22% 8% 4% 4% 11% 27% 11%
secondary 19% 2% 24% 8% 27% 19%
primary 18% 9% 13% 8% 15% 18% 14%
RESIDENCE TYPE
village 21% 7% 15% 8% 15% 4% 15% 14%
town 19% 7% 17% 4% 13% 24% 14%
city 15% 9% 17% 4% 9% 4% 24% 17%
capital 21% 8% 16% 8% 27% 14%
PARTY PREFERENCE
Would not vote 20% 8% 20% 10% 19% 21%
Parties not in parliament 9% 4% 43% 11% 33%
Opposition parties 16% 11% 16% 4% 9% 4% 26% 15%
Governing parties 17% 6% 19% 4% 12% 22% 14%
Undentifiable 22% 8% 13% 5% 9% 21% 20%
Domestic Internet news sites
International Internet news sites
Domestic TV stations
International TV stations
Domestic printed press
International printed press
Social media
Nowhere
Undentifiable

Figure 2: Through which sources do you follow Greek foreign policy? (Source: Own data collection conducted by Fisherman's Online Ltd. 2024)

The next question addressed a central issue: Through which sources do you follow Greek foreign policy? Figure 2 shows that information sources were diverse, with clear emphasis on digital platforms. The most commonly mentioned sources were social media (24%), domestic internet news sites (18%), and domestic television (17%), followed closely by international television (15%). Traditional print media accounted for 10%, while international sources were used less frequently, ranging from 8% (international internet news) to just 3% (international print). Demographic differences are also indicative. Political affiliation clearly influenced preferences: opposition supporters were more likely to use digital platforms (53%), and, despite having a strong interest in domestic sources (48%), also showed notable openness to international ones (29%). In contrast, government voters relied less on digital media (45%) and international sources (11%), and focused more on domestic outlets (48%), including TV and the printed press (29%). The leading role of social media is also indicative in both cases.

Educational background also shaped preferences. Educational background also shaped preferences. Respondents with tertiary education reported the highest use of digital platforms (61%) and were significantly more likely to consult international sources (33%). In contrast, those with primary education showed a strong preference for domestic sources (59%), particularly television and printed press (44%), and were far less likely to use international content (7%).

Similar trends appear across residence types. Citizens living in the capital and major cities were more digitally oriented, with a combined digital media usage of 57–59%, and greater openness to international news sources (24–27%). Meanwhile, respondents in towns and villages relied more heavily on domestic media (52–55%), primarily TV and print (34–36%), and made limited use of international or online platforms. Social media remained a significant source across all groups but was particularly dominant in more urban and highly educated segments of the population. Although less notable, age and gender differences were still observable. As expected, the most active users of social media and digital platforms were younger respondents (ages 18–39), whereas older age groups (60 and above) relied more heavily on television and print media. Men tended to consult a broader range of sources, while women demonstrated a stronger preference for domestic, traditional media channels, particularly television.

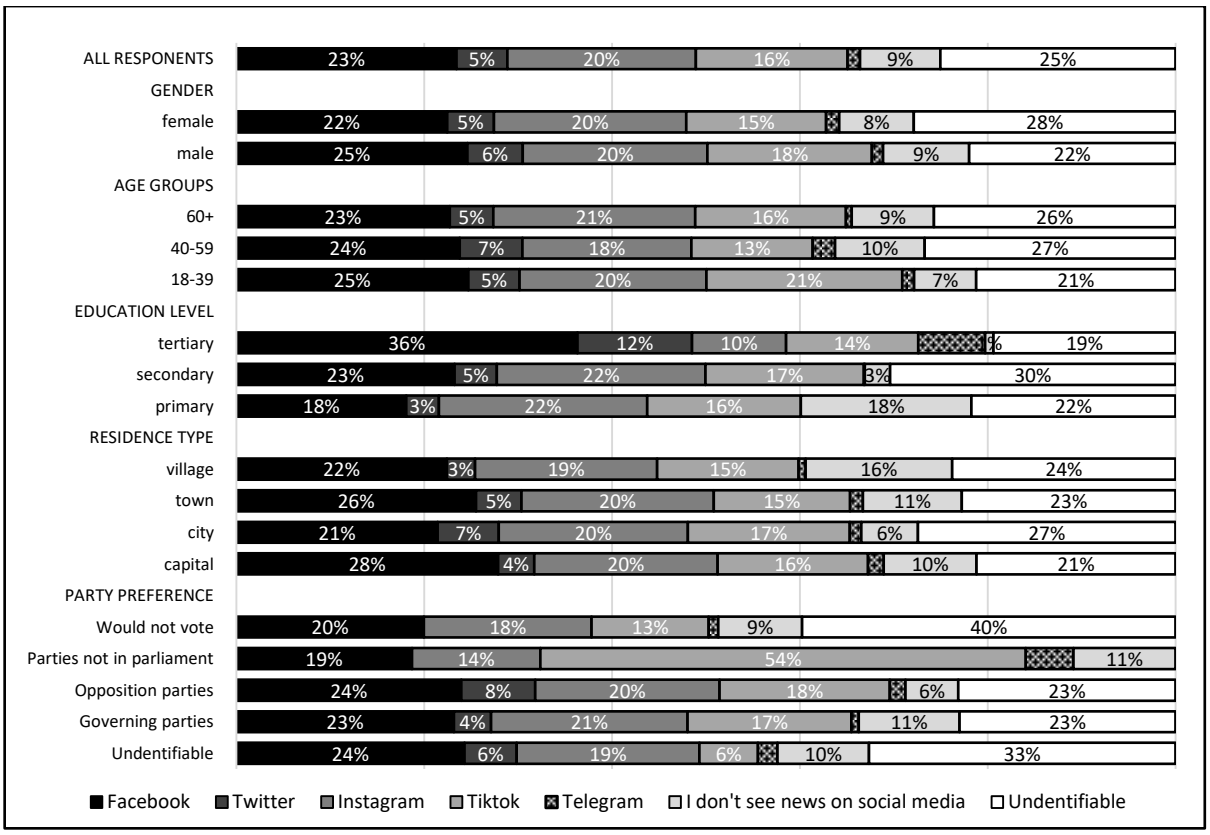
ALL RESPONENTS 23% 5% 20% 16% 9% 25%
GENDER
female 22% 5% 20% 15% 8% 28%
male 25% 6% 20% 18% 9% 22%
AGE GROUPS
60+ 23% 5% 21% 16% 9% 26%
40-59 24% 7% 18% 13% 10% 27%
18-39 25% 5% 20% 21% 7% 21%
EDUCATION LEVEL
tertiary 36% 12% 10% 14% 1% 19%
secondary 23% 5% 22% 17% 3% 30%
primary 18% 3% 22% 16% 18% 22%
RESIDENCE TYPE
village 22% 3% 19% 15% 16% 24%
town 26% 5% 20% 15% 11% 23%
city 21% 7% 20% 17% 6% 27%
capital 28% 4% 20% 16% 10% 21%
PARTY PREFERENCE
Would not vote 20% 18% 13% 9% 40%
Parties not in parliament 19% 14% 54% 11%
Opposition parties 24% 8% 20% 18% 6% 23%
Governing parties 23% 4% 21% 17% 11% 23%
Undentifiable 24% 6% 19% 6% 10% 33%
Facebook
Twitter
Instagram
Tiktok
Telegram
I don't see news on social media
Undentifiable

Figure 3: On which social media platforms do you most often encounter foreign policy news? (Source: Own data collection conducted by Fisherman's Online Ltd. 2024)

Given the leading role of social media in foreign policy information consumption, it was important to examine which platforms Greeks use most frequently. Overall, Facebook (23%), Instagram (20.1%), and TikTok (16%) emerged as the most popular platforms, followed by Twitter (5.4%) and Telegram (1.3%). A notable 8.5% of respondents indicated that they do not encounter foreign policy content on social media, while 25% provided no clear response. Gender differences were minimal, though men showed slightly higher usage of Facebook. Age differences were similarly limited: Facebook remained the preferred platform across all age

groups, although younger respondents also actively engaged with TikTok and Instagram. Political affiliation revealed broadly similar patterns between government and opposition supporters, with differences of approximately 1% across the three leading platforms. However, opposition voters showed slightly higher usage of Twitter (6%), whereas 11% of government voters reported not encountering any foreign policy news on social media. A notable trend appeared among supporters of non-parliamentary parties, who significantly favoured TikTok (54%) and showed much lower use of Facebook and Instagram compared to other voter groups.

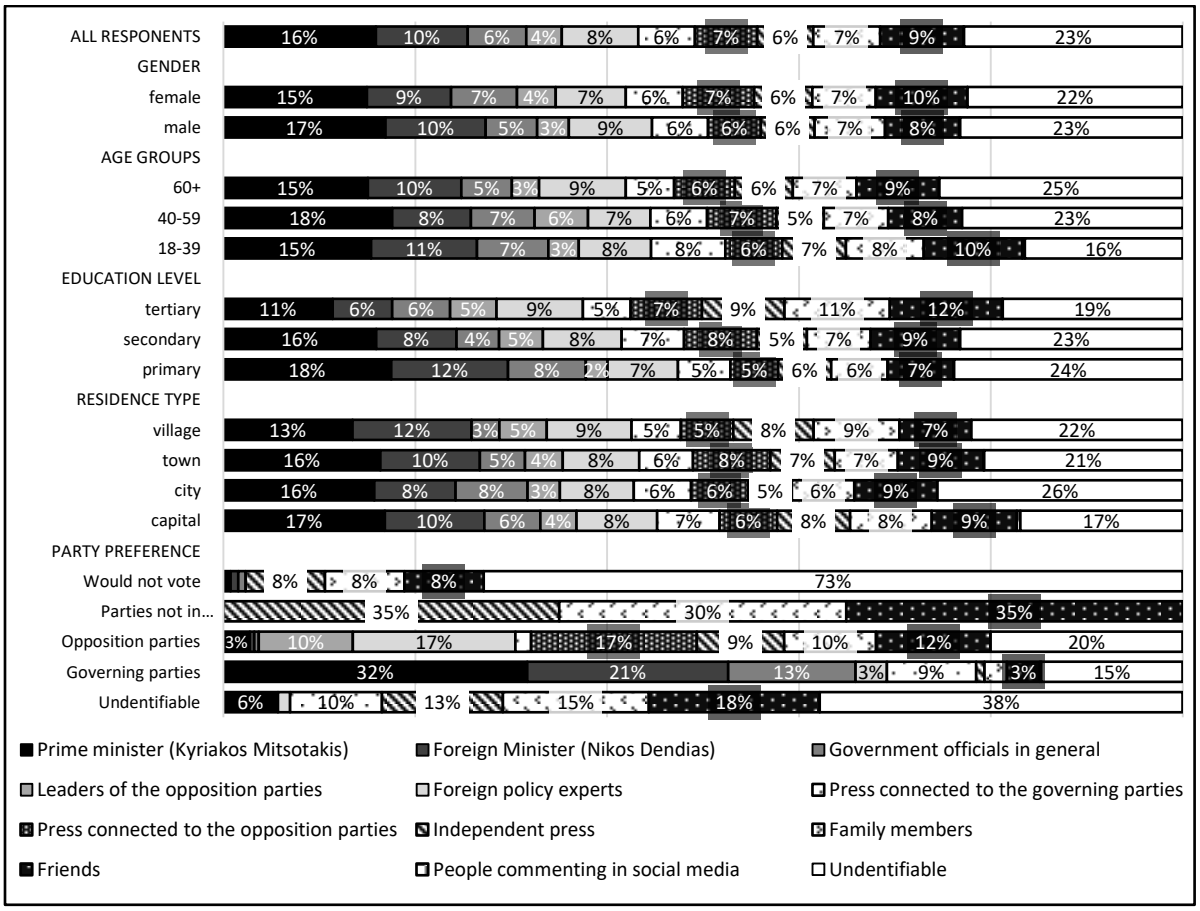
ALL RESPONENTS 16% 10% 6% 4% 8% 6% 7% 6% 7% 9% 23%
GENDER
female 15% 9% 7% 4% 7% 6% 7% 6% 7% 10% 22%
male 17% 10% 5% 3% 9% 6% 6% 6% 7% 8% 23%
AGE GROUPS
60+ 15% 10% 5% 3% 9% 5% 6% 6% 7% 9% 25%
40-59 18% 8% 7% 6% 7% 6% 7% 5% 7% 8% 23%
18-39 15% 11% 7% 3% 8% 8% 6% 7% 8% 10% 16%
EDUCATION LEVEL
tertiary 11% 6% 6% 5% 9% 5% 7% 9% 11% 12% 19%
secondary 16% 8% 4% 5% 8% 7% 8% 5% 7% 9% 23%
primary 18% 12% 8% 2% 7% 5% 5% 6% 6% 7% 24%
RESIDENCE TYPE
village 13% 12% 3% 5% 9% 5% 5% 8% 9% 7% 22%
town 16% 10% 5% 4% 8% 6% 8% 7% 7% 9% 21%
city 16% 8% 8% 3% 8% 6% 6% 5% 6% 9% 26%
capital 17% 10% 6% 4% 8% 7% 6% 8% 8% 9% 17%
PARTY PREFERENCE
Would not vote 8% 8% 8% 73%
Parties not in... 35% 30% 35%
Opposition parties 3% 10% 17% 17% 9% 10% 12% 20%
Governing parties 32% 21% 13% 3% 9% 3% 15%
Undentifiable 6% 10% 13% 15% 18% 38%
Prime minister (Kyriakos Mitsotakis)
Foreign Minister (Nikos Dendias)
Government officials in general
Leaders of the opposition parties
Foreign policy experts
Press connected to the governing parties
Press connected to the opposition parties
Independent press
Family members
Friends
People commenting in social media
Undentifiable

Figure 4: Which sources of foreign policy information do you consider credible? (Source: Own data collection conducted by Fisherman's Online Ltd. 2024)

As the Greek information environment has long suffered from a credibility deficit and public distrust (Frangonikolopoulos 2007; Pleios and Frangonikolopoulos 2013), the survey examined respondents' trust in standard sources of foreign policy information. Accordingly, Figure 4 presents the credibility attributed to various sources of foreign policy information among respondents. In terms of overall results, the prime minister (16%) was the most trusted individual source, followed by the foreign minister (9.6%), respondents' friends (9%) and foreign policy experts (8.0%). Trust in both government officials in general (6%) and opposition leaders (3.7%) was relatively low, and the independent press (6%) only slightly exceeded the party-affiliated media. Family members (7%) and friends ranked higher than most media outlets, while

people commenting on social media were trusted the least (0.05%). A large portion of responses (22.8%) were undetermined, signaling the broader climate of distrust and uncertainty in the Greek information environment.

Trust patterns across gender were broadly similar, with differences between categories generally limited to 1–2%. Across all age groups, the prime minister was the most trusted source, with slightly higher trust among respondents aged 40–59 (18%). Younger adults (18–39) showed greater openness to trusting friends and informal social sources, while older respondents placed more trust in government officials and traditional media. Trust in foreign policy experts remained consistent across age groups but relatively low overall (7–9%) compared to political decision-makers. In terms of education, the credibility attributed to the prime minister declined with higher qualifications: it stood at 17.5% among those with primary education, 15.9% among those with secondary education. It fell to 11.4% among tertiary-educated respondents. The credibility of the foreign minister follows a similar pattern.

In contrast, foreign policy experts gained credibility as education increased, rising from 7.3% among those with primary education to 9.0% among those with tertiary degrees. Respondents with tertiary education also found friends (11.7%), family members (11.0%), and the independent press (8.6%) more credible compared to those with lower educational backgrounds, who tended to place similar trust in government figures, party-affiliated media and social sources. Credibility patterns changed moderately by place of residence. Capital residents gave the highest credibility to the prime minister (16.9%), while village residents were least likely to do so (13.5%), but placed more trust in the foreign minister (12.4%). While other categories showed relatively similar scores across all settlement types, notable differences emerged in views on government officials in general, with credibility being clearly lower in villages compared to urban areas.

The most considerable differences were observed along party preferences, highlighting not only an intense polarization between government and opposition voters, but also deeper fragmentation when non-voters and supporters of non-parliamentary parties are considered. Opposition voters largely rejected government figures as credible sources, attributing very low credibility to the prime minister (3%) and foreign minister (0.5%), while placing greater trust in foreign policy experts (17%) and opposition press, the opposition leaders (10%) and independent press (9%).

In contrast, government supporters displayed a strong preference for institutional figures, particularly the prime minister (32%) and the foreign minister (21%), while expressing minimal credibility toward opposition actors or independent media. Non-voters generally refrained from assigning high credibility to any category, although they tended to place greater trust in the independent press as well as family and friends. Supporters of non-parliamentary parties exhibited highly selective trust, largely disregarding mainstream actors such as the prime minister and instead favoring alternative sources or social networks. These patterns reveal a fragmented credibility landscape, shaped by political orientation and characterized by selective trust and parallel narratives.

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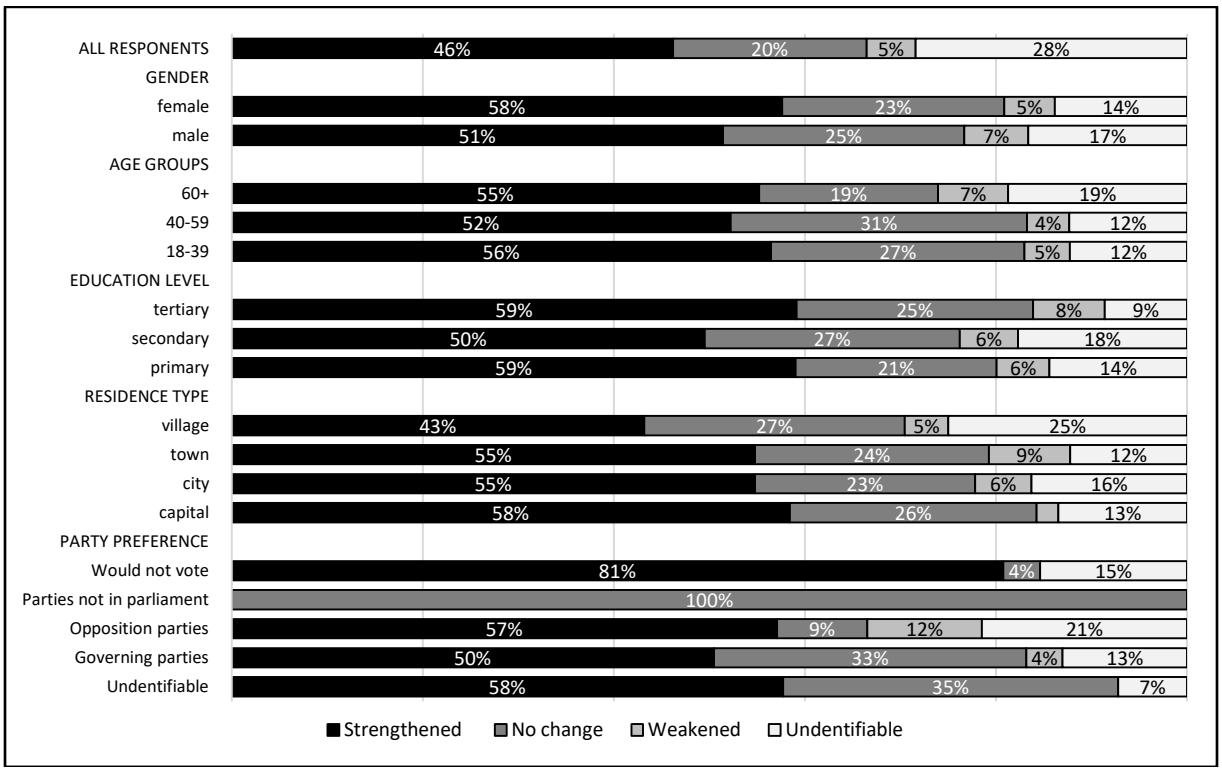

Figure 5: Do you consider the increasing use of digital solutions to strengthen, weaken, or have no impact on opportunities for democratic participation?
(Source: Own data collection conducted by Fisherman's Online Ltd. 2024)

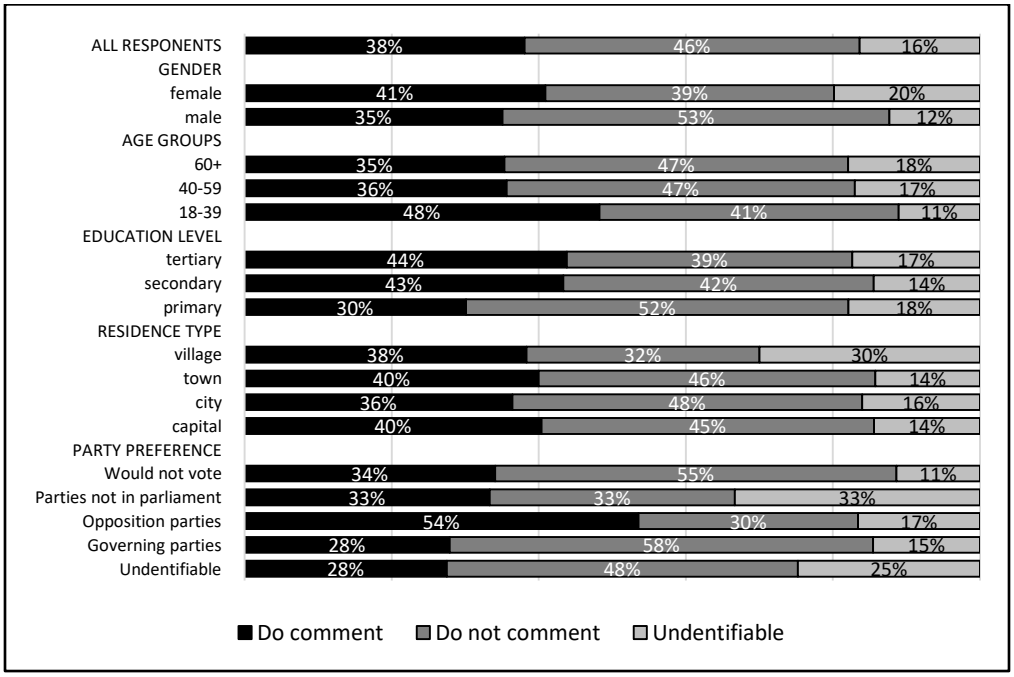

Figure 6: Do you comment on foreign policy news on social media or digital news platforms?
(Source: Own data collection conducted by Fisherman's Online Ltd. 2024)

Considering the widespread dissatisfaction among Greeks with their democratic processes, along with theoretical claims that digitalization can democratize information environments (Manor 2019; Sotiriu 2015; Gilboa 2016), the survey also explored perceptions of digitalization's impact and respondents' willingness to engage in foreign policy discussions on social media. Analyzed together, Figures 5 and 6 reveal an interesting gap between positive perceptions of digitalization and actual online participation. Figure 5 shows that majorities across nearly all demographic groups believe digitalization has strengthened opportunities for democratic participation. However, respondents from villages were slightly more skeptical, as were supporters of non-parliamentary parties, who saw no significant change. This overall positive perception contrasts with Figure 6, which suggests that most respondents do not actively engage with foreign policy content. The gap was particularly visible among government voters and respondents with primary education: while half or more (50% and 59%, respectively) viewed digitalization positively, their actual participation levels were comparatively low (28% and 30%, respectively). Different patterns emerged among opposition voters and younger respondents, who showed a closer alignment between their high confidence in digitalization's democratic potential (57% and 56%) and their active engagement in online foreign policy discussions (54% and 48%). Despite these notable exceptions, the overall findings suggest that while digitalization is broadly seen as democratising, positive perceptions do not necessarily translate into consistent active engagement.

DISCUSSION AND IMPLICATIONS

This section interprets the empirical findings by first examining the main trends identified in the analysis and assessing how they correspond with existing research on the Greek information environment. This provides a basis for addressing the research questions and comparing the results with the theoretical arguments outlined earlier.

Beginning with the main trends, findings related to Figure 1 confirm that Greek public interest in foreign policy remained relatively high during the sample period, with the majority of respondents engaging with foreign affairs at least once a week. This indicates that foreign policy continued to be politically and commercially relevant to the Greek public, remaining a key topic of public discourse despite turbulent domestic affairs and economic struggles. While sustained public interest has preserved the political and commercial value of the foreign policy market (Baum and Potter 2008, 2019), the composition of its key actors has undergone a clear shift. This is related to the overwhelming digitalization of information gathering patterns: according to survey results, digital platforms, particularly social media and domestic online news outlets, have become the primary source of foreign policy news, thereby superseding the traditional gatekeeping role of offline media.

On the one hand, this suggests that the Greek foreign policy market has undergone a significant transformation over the past decade, with online agenda-setting capacities becoming increasingly important. On the other hand, it also reflects the emergence of new digital actors and mediums (e.g., Figure 3) that complement or replace earlier intermediaries in the distribution of information commodities.

While these general trends are clearly visible, the survey also indicates that the consumption of foreign policy information is neither over-centralized nor evenly distributed

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among different sources. This means that despite the lack of a single dominant actor and the plurality of the information space, respondents still tended to rely on one-sided sources. As shown in Figure 2, media consumption is highly fragmented across both domestic and international sources, with political affiliation, education level, and age serving as key factors in shaping these patterns. This suggests that distrust identified in the offline media environment has been transferred to digital platforms. Figure 4 further supports this by highlighting how credibility assessments are shaped by political and demographic divides, with respondents expressing selective trust aligned with their political affiliation and social background. These patterns confirm that, although digitalization has expanded the range of available sources and improved access to information, it has not mitigated selective exposure or political alignment; the polarization and media fragmentation of the offline environment have remained largely unchanged (Iosifidis and Boucas 2015; Kalogeropoulos et al. 2021a). Accordingly, the majority of respondents did not or could not utilize the diversity of information provided by the digital foreign policy market; instead, they engaged with one-sided narrative sources, either directly through self-selection or indirectly through algorithmic filtering and targeted advertising.

The transfer of offline structures to the online space also influenced how respondents used digital platforms to access foreign policy information. While Figure 5 showed that a clear majority viewed digitalization as an opportunity to enhance democratic participation, Figure 6 revealed that this potential remained largely unrealised in practice. Most respondents did not actively participate in online discussions of foreign policy, except for opposition voters and younger individuals aged 18–39. This lack of activity suggests that, despite general optimism about the democratic potential of digital platforms, many citizens remained disengaged due to disinterest (as seen among non-voters), satisfaction with the policy orientation (in the case of government voters), or persistent distrust rooted in the perceived replication of offline echo chambers in the digital environment. These patterns help explain how the traditional features of the Greek foreign policy market have re-emerged online.

First, information providers have transferred political polarization and commercialized practices into digital spaces. Second, citizens themselves often reproduce offline behaviors, favoring familiar sources and avoiding critical or pluralistic engagement, thereby constraining the transformative potential of digitalization.

These empirical findings provide a solid foundation for addressing the research questions. The first question (Q1) asked which sources of foreign policy information are the most recent and most important for the Greek public. The findings indicate that foreign policy information gathering has mainly become digitalized. Social media platforms and domestic online news sites now serve as the primary channels through which most Greek citizens access foreign policy content. Although traditional outlets, such as TV and print media, remain relevant, particularly among older respondents, the broader trend clearly favors digital platforms. However, the distribution of source preferences is far from uniform. It is segmented along key demographic and political lines, with younger, urban, and opposition-aligned respondents showing a marked preference for digital sources. This reflects a reshaped media environment where digital intermediaries have become central, even though no single actor holds dominant agenda-setting power.

The second research question (Q2) examined the extent to which digitalization has altered traditional patterns of information consumption. The survey data suggest that, while

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digitalization has broadened access and diversified the range of sources, it has not fundamentally changed the structural characteristics of the Greek media system. As Figures 2 and 4 illustrate, political polarization, selective exposure, and media fragmentation remain central features of the information environment. Respondents continue to rely on ideologically aligned sources, and credibility assessments are still largely influenced by political affiliation and social background. In this regard, digitalization has transformed the channels through which information is consumed but has replicated, rather than replaced, the core dynamics of the offline system.

The third research question (Q3) examined how socio-demographic factors influence patterns of information gathering. The results indicate that education and type of residence were particularly influential in shaping both media preferences and assessments of credibility. Respondents with tertiary education and those living in urban areas were more likely to use a wide range of information sources, including international ones, and to express skepticism toward government-affiliated media. In contrast, individuals with lower levels of education and those living in rural areas relied more heavily on traditional domestic sources and institutional figures. Age and political orientation also played a key role: younger individuals and opposition supporters were more digitally engaged and more likely to comment on foreign policy online, whereas non-voters and government supporters exhibited lower levels of both engagement and platform diversity.

The theoretical implications of these answers enable us to identify a few broader implications.

Firstly, in contrast to the assumptions of the Almond-Lippmann consensus, which suggested that the general public is largely uninformed and indifferent to international affairs (Almond 1956; Lippmann 1955), the survey results reveal a relatively high level of interest in foreign policy among Greek respondents. This finding supports the key principles of neoliberal theories, which argue that citizens can form stable, rational views on global affairs (Nye and Keohane 1971; Rosenau 1980; Burton 1972). However, the Greek case also highlights key limitations: interest alone does not necessarily translate into active or critical participation, even within the more accessible and interactive environment of digital media. Structural and cultural constraints, such as political polarization, media distrust, and algorithmic filtering, continue to limit engagement, indicating that the potential for public influence remains significantly mediated.

Secondly, the findings also help clarify theoretical perspectives on how the public gathers information about foreign policy. These perspectives range from top-down, elite-driven frameworks to bottom-up, pluralist approaches, offering competing interpretations of the relationship between controlled information flows and citizen-initiated engagement (Holsti 1992; Kertzer 2023). The Greek case reveals a hybrid configuration: while digital platforms theoretically support more horizontal flows of information, actual patterns of access and trust remain shaped mainly by vertical structures. Most respondents continue to rely on ideologically familiar sources, and credibility is often attributed based on political affiliation rather than expertise or neutrality. This supports the argument that even within a formally pluralistic media environment, information-gathering is defined by existing social identities, political orientations, and institutional traditions (Zaller 1992; Kertzer 2023).

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Thirdly, the results should also be examined in terms of the transformative effects of digitalization. In this respect, Greece followed global trends, showing clear signs of an accelerating shift towards a digitalised foreign policy market. While these changes were evident at both structural and technical levels, such as expanded access and the introduction of new intermediaries, their qualitative impact on the foreign policy market, particularly in terms of public engagement, was limited. Contrary to more optimistic expectations in the literature (Baum and Potter 2008, 2019; Bjola and Manor 2022), digitalization did not lead to broader societal participation in foreign policy processes; the Greek case largely reproduced established patterns of information asymmetry and selective trust. Although these patterns helped to avoid the current centralizing tendencies observed elsewhere in the Balkans and Central Europe (Ilić and Markov 2024; Kacziba 2024; Dudlák 2023), they still reflect the characteristics of polarized pluralist systems (Papathanassopoulos 2013), now reinforced by digital fragmentation and online asymmetries.

CONCLUSION

This study examined how Greek citizens access foreign policy information in the digital era. The findings confirm that Greece's foreign policy information environment has shifted toward digital channels; however, this shift has not led to a more dialogic public sphere. Despite broader access, political polarization, selective exposure, and low credibility continue to shape how information is accessed and consumed. As a result, information gathering in the digital space replicates old tendencies. Instead of relying on expert opinion and objective analysis, citizens often turn to political sources or trusted, yet non-professional, social media sources. These results reveal a hybrid configuration in which digitalization has broadened horizontal access to foreign policy information. However, vertical structures such as political bias, distrust, and algorithmic curation continue to influence consumers' judgments on international affairs.

The results support theoretical claims that public interest in foreign policy is higher and more consistent than classic public opinion theory suggests (Almond 1956; Lippmann 1955). This aligns with subsequent work treating citizens as attentive actors (Holsti 1992; Page and Shapiro 1992). Nevertheless, the lack of active democratic participation suggests that a greater interest in and a digitalized foreign policy information market do not automatically translate into citizen involvement (Aalberg, Van Aelst, and Curran 2010; Değirmenci 2020; David 2022; Manor 2019). In Greece, this is linked to the persistence of a polarized-pluralist media system that absorbed digitalization into its established logic rather than being transformed by it (Hallin and Mancini 2004; Papathanassopoulos 2013; Kalogeropoulos et al. 2021). The same patterns influence trust in foreign policy information sources, leaning not only toward favored politicians but also toward peer networks. This demonstrates that Greece continues to exhibit Southeast European tendencies (Valchanov et al. 2022; Ilić and Markov 2024; Tzifakis and Vasdoka 2025).

Research related to this paper suggests that analyzing digitized foreign policy processes necessitates a more comprehensive consideration of public opinion and broader societal dynamics. This study attempted to address this requirement by conducting a cross-sectional, self-reported survey to map source use, credibility judgments, and participation patterns. While this approach produced valuable results, the study had limitations: it did not analyze behavior on specific digital platforms, it did not trace preferences toward audiovisual social media (e.g.,

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YouTube), and, as a single-country case study, it failed to generate comparative results suitable for generalization. Future research should therefore focus on specific foreign policy issues and test which messages, messengers, and formats build trust and encourage participation, while also placing case studies in comparative contexts.

CONTRIBUTOR

The author contributed solely to the intellectual discourse that forms the foundation of this article, as well as its writing and editing, and assumes full responsibility for its content and interpretation.

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AI Declaration:
The authors acknowledge the use of AI tools—specifically ChatGPT-5—to assist in translating and enhancing the clarity and quality of the English language in this manuscript. These AI tools were employed solely for language refinement and were not involved in the conceptualization, analysis, or development of the scientific content. The authors assume full responsibility for the manuscript's originality, accuracy, validity, and integrity.

Statement of Human Rights:
The study adhered to the ethical standards outlined in the Declaration of Helsinki and relevant guidelines for research involving human participants. A nationwide online survey was conducted from February 2 to 14, 2024, among Greek citizens aged 18 and above. Participation was voluntary, fully anonymous, and no personal identifying information was collected or transferred. Data collection was managed by Fisherman's Online Ltd., a professional survey company.

Statement on the Welfare of Animals:
This article does not contain any studies with animals performed by any authors.

Informed Consent:
All participants provided informed consent before participating. They were informed about the study's purpose, procedures, and their right to withdraw at any time. The self-administered questionnaire, completed anonymously on a dedicated Greek-language website, ensured that participants' privacy and autonomy were fully protected. No identifying information was collected or linked to responses, further safeguarding participants' confidentiality.

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Protecting Fundamental Freedoms and Promoting Gender Equality: The Case for Binding Quotas on Macedonian Corporate Boards

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Abstract
This paper analyzes gender balance on the boards of companies listed on the Macedonian Stock Exchange (MSE). Despite formal equality, statistics reveal persistent vertical segregation in top management. A comparative assessment places North Macedonia favorably within the Western Balkans and the European Union; however, further progress is still needed. Adopting a legal gender quota, as outlined in Directive (EU) 2022/238, would help close the gap, fulfill obligations under CEDAW, and reinforce the country's commitment to the United Nations' fifth Sustainable Development Goal on gender equality, ensuring that fundamental freedoms, gender balance, and equal remuneration are upheld in practice rather than merely acknowledged.

Keywords
Gender Balance; Corporate Boards; North Macedonia; Macedonian Stock Exchange; Gender Quota; CEDAW; Sustainable Development Goal 5

INTRODUCTION

Women and men are born equal, but women, unfortunately, are faced with discrimination in everyday life. In contemporary environments, despite progress and commitment to establishing a common standard for equality among all people, gender inequality remains a global challenge. Women continue to face discrimination, distinction, exclusion or preference made based on sex, which has the effect of nullifying or impairing equality of opportunity or treatment in employment. They are faced with violence, unequal remuneration for work of equal value, limited access to leadership at all levels of decision-making in political, economic and public life, etc. Achieving gender equality is not only a matter of women's empowerment or a question of justice and human rights; it is also a fundamental driver of social and economic development in prosperous and inclusive societies.

The Convention on the Elimination of All Forms of Discrimination against Women (CEDAW), adopted by the United Nations General Assembly in 1979, is the most significant international legal instrument that focuses specifically on gender equality and the elimination of discrimination against women.

The basis of gender equality can be found in Article 23 of the Universal Declaration of Human Rights (1948), which declares that everyone has the right to work, to free choice of employment, to just and favorable working conditions, and to protection against unemployment. The International Labour Organization (ILO) has established several fundamental conventions dedicated to promoting human and labour rights. Among these conventions, particularly in relation to gender equality, are Convention No. 111 on Discrimination (Employment and Occupation) (1958) and Convention No. 100 on Equal Remuneration (1951).

The Beijing Declaration and Platform for Action of 1995, a visionary agenda for the empowerment of women, remains the most comprehensive global policy framework and blueprint for action, serving as a current source of guidance and inspiration for realizing gender equality and the human rights of women and girls (United Nations 2014).

The growing demands for improved transparency and inclusivity contributed to significant attention for greater gender equality. For the last three decades, the topic of women's representation on corporate boards has been a primary focus in developed countries.

Nowadays, gender balance is a critical component of the United Nations (UN) Sustainable Development Goals (SDGs) and one of the most important issues in Europe. According to SDG target 5.5, every country should ensure women's full and effective participation, as well as equal opportunities for leadership, at all levels of decision-making in political, economic, and public life.

Numerous studies have emphasized that gender equality is a key driver of economic growth and enterprise development. Progress towards gender equality is a core contributor to more economically prosperous and socially cohesive societies. Studies show that the loss in human capital wealth due to gender inequality exceeds $160 trillion (Wodon and De la Brière 2018). Women's participation in the economy contributes to economic growth and productivity.

Conversely, restricting women's opportunities can hinder economic growth, resulting in slower or lower economic growth. Statistics show that even in 2023, women earn less than men, and women in traditional occupations often hold low-value jobs under poor and vulnerable conditions. Across the OECD (2023), the gender wage gap in 2023 averages 11%. This means that, on average, a woman working full-time earns around 89 cents for every dollar or euro a full-time working man earns (OECD 2023). Traditionally, women were preferred for service, clerical, and housework or caregiving jobs (Chowdhury et al. 2018), while men were generally preferred for jobs requiring more experience, sales-related positions, and access to higher-paying and more stable careers. Segregation can be horizontal, with women and men concentrating in different sectors, industries, occupations, types of products, and business sizes, and vertical, with gender disparities in positions of different statuses, managerial responsibilities, or potential for promotion (Carranza et al. 2019).

Although there was intense public debate and some voluntary initiatives at both the national and European levels, the situation regarding vertical segregation has not changed significantly. Between 2003 and 2012, the average annual increase in the number of women on boards was only 0.6 percentage points (European Commission 2012). Research by d'Hoop-Azar et al. (2017) shows a significant global disparity, with the proportion of female directors ranging from as low as 5–6% in large economies such as Japan and Brazil to 30% or higher in several Nordic countries.

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According to Articles 23(1) and 23(2) of the Charter of Fundamental Rights of the European Union (2000/C 364/01), equality between men and women must be ensured in all areas, including employment, work, and pay. The principle of equality shall not prevent the maintenance or adoption of measures providing for specific advantages in favour of the under-represented sex.

On 14 November 2012, the European Commission proposed legislation aimed at achieving a 40% objective for the underrepresented sex in non-executive board member positions in publicly listed companies, except for small and medium-sized enterprises. A significant step forward in gender equality on the territory of the European Union was made in 2022, when 10 years after the European Commission proposal, the Directive (EU) 2022/2381 of the European Parliament and of the Council of 23 November 2022 on improving the gender balance among directors of listed companies and related measures was adopted.

According to Article 5 of the Directive, EU Member States must ensure that listed companies achieve the following objectives: at least 40% of non-executive director positions are held by the underrepresented sex, and at least 33% of all director positions, including both executive and non-executive, are held by the underrepresented sex. Gender quotas in corporate boards were not a novelty in worldwide legislation. In 2017, nine countries had gender quotas for corporate boards (World Bank 2017).

Statistics in the Republic of North Macedonia shows that in the most cases women have low-valued jobs, and in 2019, in time when average monthly net wage paid per employee was 26 836 denars (State Statistical Office 2020), structure of employees that earns more than 40.000,00 denars monthly net wage, consisted 77.6% men and 22,4% women (Assembly of Republic of North Macedonia 2022). An opposite trend is evident in the higher education sector, where the share of female graduates reached 64.8% in 2023 (State Statistical Office 2024). Unfortunately, the Republic of North Macedonia has not yet introduced gender quotas for corporate boards into its legislation.

The main objective of this research is to analyze women's representation in the management bodies of joint-stock companies listed on the Macedonian Stock Exchange, with a focus on gender equality in the management bodies of the ten largest listed companies included in the MBI10 stock market index. This is compared with selected Western Balkan countries and EU Member States.

The remainder of the paper is organized as follows: it begins with a review of previous research on gender balance in businesses, followed by an examination of the legal framework related to gender equality in corporate boards. Next, the paper describes the data and methodology used in the study, and then presents and discusses the results of the analysis. The paper concludes with a summary of the findings and offers recommendations.

LITERATURE REVIEW

In the 21st century, women still account for a small percentage of corporate boards of directors, which remain predominantly male in most countries worldwide. The lack of gender balance in corporate governance has sparked a global debate, prompting policymakers and governments to recognize gender equity in corporate boards as a crucial objective. As it

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becomes an increasingly important issue, countries around the world are taking steps to improve and enhance gender diversity in corporate boards (Marzulio 2020).

Over the last decade, a noticeable trend has emerged in several countries worldwide, increasing the representation of women on boards, as evidenced by the fact that corporations with female executives tend to make better decisions for shareholders (Huang and Kisgen 2013). Although European countries were the leading parties in promoting women's rights in the workplace, countries worldwide followed the trend of achieving gender balance in corporate boards.

Over the last decade, increasing research attention has been focused on the issues of gender diversity on corporate boards and its impact on company performance. Many research reports have indicated a positive correlation between having women on corporate boards and the performance of companies, as women bring different views, a set of skills and experiences to the board decision-making process.

According to Torchia et al. (2011), women can bring unique perspectives, experiences, working styles, and wisdom, as well as a good atmosphere in the boardroom. They are also found to have different values and are more sensitive to women's issues. Similarly, Martínez and Rambaud (2019) in their research found that the increasing number of women on boards is positively related to higher financial performance. Moreover, as expected, the law on mandatory gender representation boosts the female proportion on boards of directors. Consequently, there are valid business and ethical arguments to support mandatory gender legislation.

On the other hand, Simionescu et al. (2021) found evidence of a positive effect of women on corporate boards on both measures of company performance, except for the percentage of female executives, in the case of return on assets (ROA). Terjesen et al. (2016) found that firms with more female directors have higher firm performance, as measured by market (Tobin's Q) and accounting (return on assets) metrics. The results also suggest that external independent directors do not contribute to firm performance unless the board is gender diversified. Overall, the findings suggest that female directors contribute to the effectiveness of boards.

Despite numerous studies confirming the positive relationship between gender equality and a company's financial performance, many studies have found a negative or no significant relationship. Therefore, Chebri and Bahoussa (2020) investigate the impact of board diversity on the financial performance of banks, and their results reveal that gender diversity has a negative and significant effect on the financial performance of listed Moroccan banks.

Additionally, the study's results indicate a relatively average level of female representation (11%) on the boards of directors of Moroccan banks, compared to a strong presence of foreign directors, estimated at 39%. Despite the contributions of this study, its main limitation is methodological, so the validity of the results depends on the relevance of the combination of instrument variables used. Singh et al. (2019) analyzed whether the presence of women on boards affects firms' financial performance and concluded that the proportion of women on boards is insignificant and does not impact financial performance. Neither has it caused any adverse impact on the performance of these firms. This study has several limitations, as it considered only Initial Public Offering (IPO) firms for a limited period of three financial years and analyzed only the gender aspect of board diversity, excluding aspects such as education levels, the experience of women directors, and directors from family firms. Shehata et al. (2017) examine the relationship between board diversity and firm performance in small and medium-

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sized enterprises (SMEs) in the United Kingdom. In particular, they examine gender and age as two dimensions of diversity, and their results reveal a significant negative association between both gender diversity and age diversity and firm performance. This study makes a unique contribution to the relevant literature by focusing on small- and medium-sized enterprises (SMEs), providing insights for entrepreneurs on how to enhance performance and for governments and policymakers on developing regulations that promote better outcomes in the SME sector.

IFC (2024) analyzed women's representation in corporate leadership across the capital markets of G20 countries. On average, women hold 23% of board seats, 8% of board chair positions, 5% of CEO roles, and 12% of CFO positions across G20 markets. In the European Union, women held 26.7% of board seats in the largest publicly listed companies in 2018. They comprised 6.7% of board chairs that year, more than double the 3.3% recorded in 2012 (European Commission, 2019).

The situation in the United States is similar. Boards of S&P 500 and Fortune 500 companies are gradually diversifying their membership. More than one-quarter (26%) of S&P 500 board directors are women, marking a record high. There are no all-male boards in the S&P 500; every company has at least one female director. Despite these milestones, women's overall representation on S&P 500 boards remains relatively low.

Gender equality is a key priority and a core commitment of the Republic of North Macedonia, as it aspires to EU membership. Establishing an adequate legal and institutional framework to promote gender equality is an essential part of the EU integration process and a fundamental value of the Union. In this regard, significant steps have been taken to improve coordination among institutions, strengthen institutional capacities, and establish mechanisms for continuous monitoring of progress toward achieving gender equality goals.

In 2006, the first Law on Equal Opportunities for Women and Men was adopted. To further promote equal opportunities and treatment for women and men, a revised and updated version of the law was adopted in 2012. The law promotes equal opportunities in all areas of public life, including political, economic, social, educational, and other spheres of activity. It prohibits any form of gender discrimination in both the public and private sectors. To facilitate the enforcement of this law, a Committee on Equal Opportunities for Women and Men was established as a permanent working body within the Macedonian Assembly. Its main task is to promote the improvement of women's status and create equal opportunities for women and men at both the national and local levels. Despite these institutional efforts, the European Commission has assessed that the country has made no progress in advancing gender equality, with no significant developments in its national policy framework for integrating gender equality or aligning with the EU *acquis*. The implementation of the National Strategy for Gender Equality (2022–2027) is also rated as poor (European Commission 2024).

The National Gender Equality Index was developed by the Ministry of Labour and Social Policy and the State Statistical Office of the Republic of North Macedonia, in cooperation with the European Institute for Gender Equality (EIGE). The Gender Equality Index measures progress in gender equality across EU countries and EU candidate countries in seven core domains: health, violence, knowledge, work, money, time, and power. The sub-domain of gender balance in economic decision-making, part of the power domain, is assessed by the proportion of

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women and men on corporate boards of the largest nationally registered companies listed on stock exchanges and national central banks (EIGE).

For 2022, North Macedonia's Gender Equality Index score is 64.5 out of 100, representing a 2.5-point increase since 2019. If progress continues at this pace (2.5 points every four years), the country would need approximately 57 years to achieve gender equality across all domains (Bashevska 2023).

In the country's largest companies, the ratio of women to men is as follows: 30:70 (with three women serving as chairpersons), 20:80 (12 women serving as board members), 26:74 (11 women serving as CEOs), and 10:90 (three women serving as CGDs) (European Institute for Gender Equality, 2018). Few studies on gender equality in North Macedonia have addressed general issues (Gjurovska 2015; Stojanoska 2008), women's political representation (Nacevska & Lokar 2017), gender equality in the labor market and progress toward Sustainable Development Goal 5 (Mazllami et al. 2016; Jonoski & Veljanovska 2024), or work–life balance (Todorova & Radulovikj 2020). However, specialized research on contemporary gender balance in corporate boards in North Macedonia remains limited.

To address this gap, our study analyzes gender representation in the management bodies of listed companies in North Macedonia from 2020 to 2024. It compares these findings with gender representation in the management bodies of MBI10 companies in North Macedonia and selected countries in the Western Balkans and the European Union.

LEGAL FRAMEWORK FOR GENDER EQUALITY ON CORPORATE BOARDS

Establishing gender equality in any area of social life is a focus of many international organizations, as well as of both international and domestic legal instruments. Gender equality on corporate boards is promoted in various ways across countries. In some cases, soft law measures such as recommendations or "comply or explain" policies are employed. In others, strict regulations establish precise quotas for women on boards. In some countries, no policies addressing this issue are in place.

De Acutis, Weber, and Wurm (2024) in their study concluded that soft policies, which do not impose sanctions for non-compliance, appear to be less effective and less likely to generate significant effects than hard quota policies. The gender balance on corporate boards has been addressed over the past twenty years, either as a component of relevant laws or as a specific topic in national guidelines for good corporate governance.

Even before the adoption of Directive (EU) 2022/2381, ten European countries had introduced binding gender quotas for boards of directors (Smith and Von Essen 2025). Norway was the pioneer in introducing gender quotas in law, adopting an amendment to the Public Limited Companies Act regarding gender balance on corporate boards in 2003 (Huse and Seierstad 2013). Spain followed this trend in 2007, when the Effective Equality Act stipulated that large companies should strive to include a sufficient number of women on their boards of directors to achieve a balanced representation of men and women (Palá-Laguna and Esteban-Salvador 2016), and by Italy in 2011, when Law No. 120/2011 (known as the Golfo-Mosca Law) required that, starting in 2012, women should comprise at least one-fifth of board members, increasing to one-third from 2015 onward (Solimene et al. 2017). The list of countries that have adopted coercive systems has gradually expanded, including, among others, Belgium, Finland,

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France, Germany, Iceland, Israel, India, and Kenya (Fornasari 2022). Norway has taken a further step forward: beginning 1 January 2024, a gradual implementation of a 40% gender quota was introduced for large and mid-sized private limited liability companies (Nw. aksjeselskaper), as well as for certain partnerships, cooperatives, and foundations (Henning Øvrebø 2024).

A few years before the adoption of measures at the EU level, company boards were predominantly dominated by one gender, with 86.3% of board members being men and 13.7% being women. Meanwhile, 96.8% of chairpersons were men, and only 3.2% were women (European Commission 2012). In response, the European Commission launched the "Women on Board Pledge for Europe" in 2012, calling on listed companies to voluntarily commit to increasing women's representation on their boards to 30% by 2015 and 40% by 2020. Although the initial response was modest, the pledge has had a greater impact when considered in conjunction with the Directive (Birkmose 2023). The pledge approach was upgraded with the Directive (EU) 2022/2381. According to Article 5 of Directive (EU) 2022/2381, EU Member States shall ensure that listed companies reach the following objectives: at least 40% of the members of non-executive directors are from underrepresented sex, and 33% of all director positions, including both executive and non-executive directors, are held by underrepresented sex. The deadline for achieving these objectives is 30 June 2026. To facilitate implementation and simplify the targets, the legislator explicitly presented the required numbers for the underrepresented sex in a table in the annex of the Directive, providing examples for boards ranging from a single position up to 30 positions. For more effective enforcement, Member States are expected to establish rules on penalties for violations of the national provisions by listed companies.

A softer approach to promoting gender equality on corporate boards involves issuing recommendations or policies through a "comply or explain" mechanism, as seen in corporate governance codes. Incorporating gender equality into these codes has given rise to the concept of "Social Gender Responsibility," which is increasingly recognized as a framework for addressing the challenges women face in the labor market (Gallo and López 2023). Corporate governance codes, which aim to improve the practices of listed joint-stock companies on a voluntary, non-binding basis, can be relevant at the international, national, or company level.

At the international level, the OECD and the International Corporate Governance Network (ICGN) play a crucial role in helping policymakers assess and enhance the legal, regulatory, and institutional framework for corporate governance. The OECD Principles of Corporate Governance, in Section V.E.4, recommend that boards evaluate their performance and maintain an appropriate composition, which includes respect for gender diversity, without prescribing any quotas (OECD 2023). In contrast, the ICGN Global Governance Principles advocate a more specific approach, stating that boards should strive to achieve appropriate gender diversity, preferably with at least one-third of board positions held by women (ICGN 2021).

National corporate governance codes in EU Member States vary in their approach to addressing gender balance. Some establish precise quotas, while others do not set numerical targets, offering instead general and often vague recommendations (Kirsch 2021).

The Republic of North Macedonia has not established a legal quota for the equitable representation of women on corporate boards. Article 10(5) of the Law on Equal Opportunities for Women and Men stipulates that the government shall promote equal opportunities for

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women and men when appointing members to commissions, bodies, delegations, and representatives on the boards of public enterprises and institutions. However, the legislation does not explicitly recognize women's right to equal opportunities in corporate board elections.

Gender representation in top management bodies of corporations is first addressed in the Macedonian Corporate Governance Code. Companies required to comply with the code must disclose in their annual reports the activities undertaken to achieve gender representation on Supervisory and Management Boards or Boards of Directors. The code sets a target of 30% female membership on supervisory and management boards by 2025, but it does not impose sanctions for non-compliance under this "comply or explain" provision.

Consequently, North Macedonia can be classified among countries that rely on a soft-law mechanism to promote gender balance, with only partial application, since not all listed joint-stock companies are obliged to comply with the code. Out of 86 listed joint-stock companies, only 26 are required to follow the code (MSE 2023).

METHODOLOGY

The paper employs a quantitative methodology based on the analysis of secondary data, with a particular focus on gender balance indicators. The data were organized and statistically processed using Microsoft Excel, applying descriptive statistics to assess the gender composition of management bodies in listed companies on the MSE. The figures generated in Excel provide clear visualizations of trends and results, enhancing both the precision and transparency of the research.

The study consists of four analyses. The first examines gender representation across the management bodies of all listed companies on the MSE. The second focuses specifically on gender representation in companies included in the MBI10 index. The third analysis involves a comparative assessment of gender balance in selected Western Balkan countries. Finally, the fourth part evaluates corporate gender balance in EU Member States and compares it with the situation in North Macedonia.

All data used in this research were obtained exclusively from secondary sources. Information on gender balance in the management bodies of all listed companies in North Macedonia was collected from the Macedonian Stock Exchange website. For the analysis of gender representation in the management bodies of companies included in the MBI10 index, data were gathered from both the Macedonian Stock Exchange website and the companies' own websites. Data for the selected Western Balkan countries and EU Member States were sourced from the European Institute for Gender Equality (EIGE) database. The EIGE data are compiled from official sources, including company and stock exchange websites, as well as contact persons in relevant organizations.

While secondary data offer advantages such as time efficiency, cost-effectiveness, and the obligation of information providers to ensure reliability and accuracy, a key limitation is the lack of control over data collection. Differences in corporate governance systems across EU countries, coupled with small sample sizes (in some countries, fewer than ten listed companies) and the disproportionate size of the country compared to the analyzed sample, may introduce measurement bias and affect the reliability and interpretation of the research findings.

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RESULTS AND DISCUSSION

Gender in the Management of Listed Companies in North Macedonia

The number of listed companies on the official market of the Macedonian Stock Exchange, together with the total number of management board members for the analyzed period, is shown in the figures below.

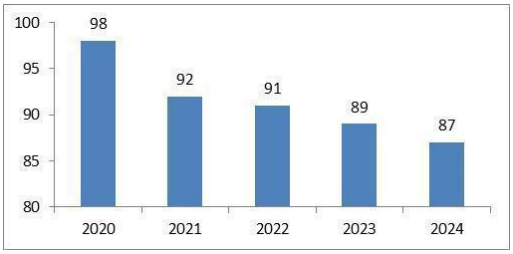

Figure 1: Number of Listed Companies on the Macedonian Stock Exchange (Source: Macedonian Stock Exchange 2020-2024)

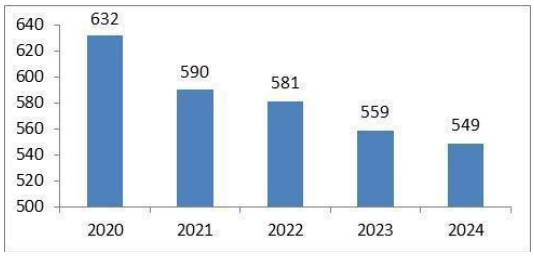

Figure 2: Total Members of Governing Bodies in Listed Companies (Source: Macedonian Stock Exchange 2020-2024)

The data in the figures show a downward trend in the number of listed companies on the official market of the MSE, decreasing from 98 companies in 2020 to 87 companies in 2024, a decline of 11.22%. Correspondingly, as shown in Figure 2, the number of members in management bodies also declined, from 632 members in 2020 to 549 members in 2024.

The following figures present the percentage of men and women participating in management bodies, as well as the percentage of men and women serving as executive directors or chairpersons of the boards of listed joint-stock companies.

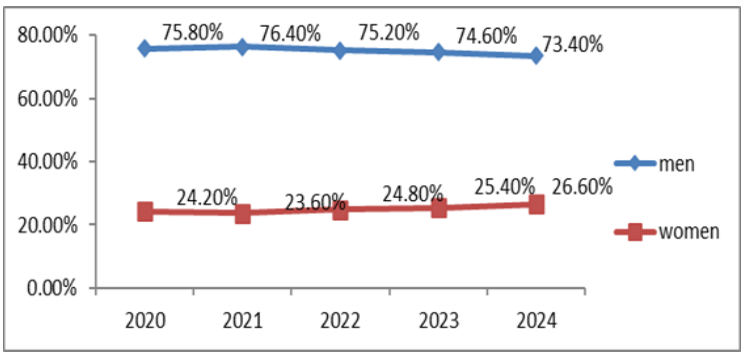

Figure 3: Gender Participation in the Governing Bodies of Listed Companies (Source: Macedonian Stock Exchange 2020-2024)

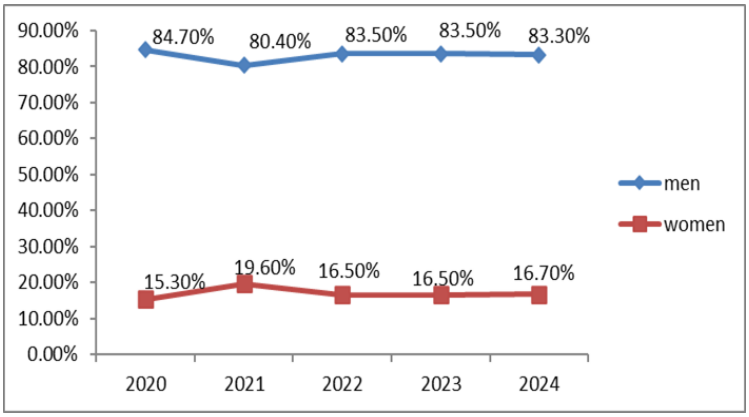

Figure 4: Participation of Men and Women as Executive Directors or Board Chairpersons in Listed Companies (%) (Source: Macedonian Stock Exchange 2020-2024)

The data in Figure 3 indicate that the percentage of men and women in the management bodies of listed companies has remained largely consistent across the analyzed years, with an average of 75% men and 25% women. Similarly, there has been little change in the proportion of men and women serving as executive directors or chairpersons of boards, with an average of 83% men and 17% women.

Considering that these data refer to 2023, listed companies on the MSE that are required to comply with the Corporate Governance Code need to increase women's participation by more than 5% to ensure at least 30% female representation in governing and supervisory bodies or boards of directors.

The following figure presents the percentage distribution of men and women in the governing bodies of listed companies by industry.

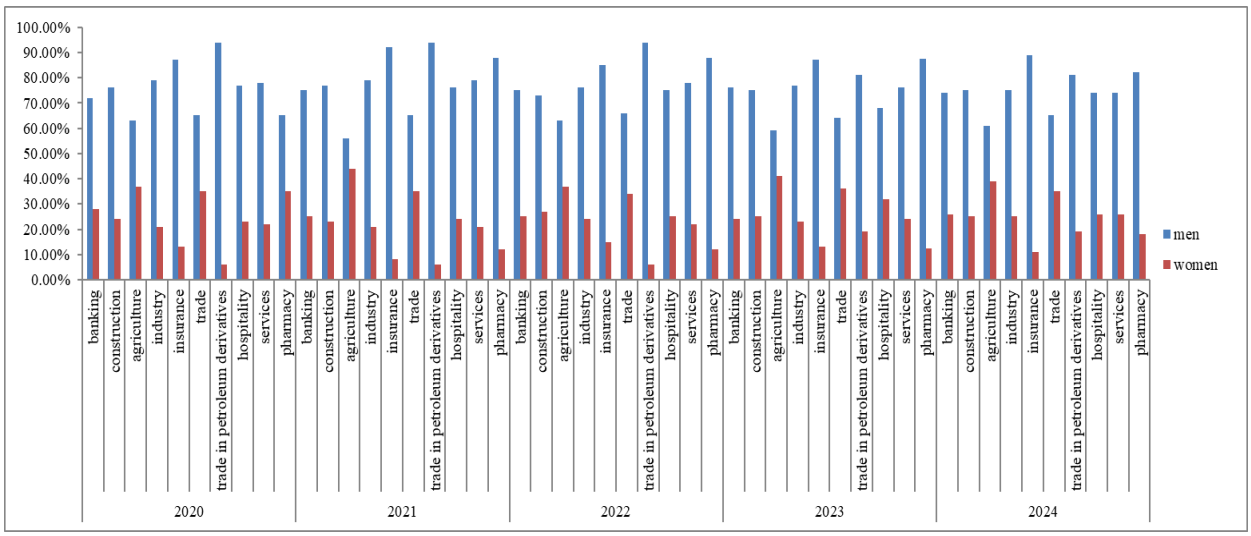

Figure 5: Participation of Men and Women in the Governing Bodies of Listed Companies (Source: Macedonian Stock Exchange 2020-2024)

The data in Figure 5 shows that, for the analyzed period, the ratio of men to women in management bodies is fairly consistent in the banking, construction, industry, and services sectors, averaging 75% men and 25% women.

The most favorable gender ratios are observed in the agriculture sector (61% men and 39% women in 2024) and the trade sector (65% men and 35% women in 2024). In contrast, the most significant gender gaps are seen in insurance (89% men and 11% women in 2024), pharmacy (82% men and 18% women in 2024), and trade in petroleum derivatives (81% men and 19% women in 2024).

The figure also highlights trends over time. In the trade in petroleum derivatives sector, women's participation has increased from 6% in 2020 to 19% in 2024. Conversely, in the pharmaceutical sector, women's participation has declined significantly, from 35% in 2020 to 18% in 2024. Overall, the agriculture sector maintains the highest level of women's participation.

Gender Representation in Management Bodies of MBI10 Companies

The Macedonian Stock Exchange Index (MBI10) consists of ten listed companies on the official market of the MSE. Nine of these companies have a two-tier management system, while one company operates under a one-tier system. The average number of members on management boards is 4.2, the average number of members on supervisory boards is 5.11, and the board of directors in the one-tier system company has 13 members.

The following figures present the number of women and men serving as chairpersons and members of management bodies, as well as the number of men and women serving as executive and non-executive members of management bodies in MBI10 companies in 2024.

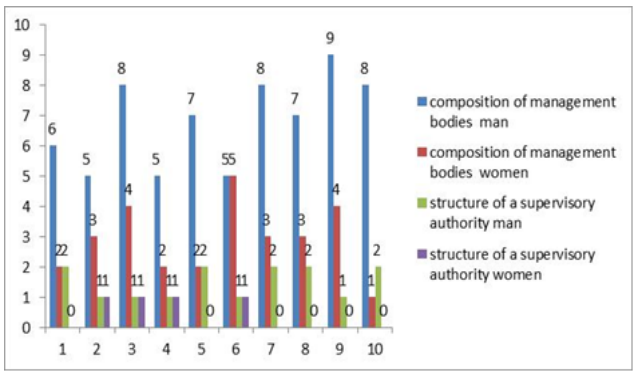
composition of management bodies man
composition of management bodies women
structure of a supervisory authority man
structure of a supervisory authority women

Figure 6: Number of Women and Men as Presidents and Members of Management Bodies in MBI10 Companies (Source: Authors' calculation)

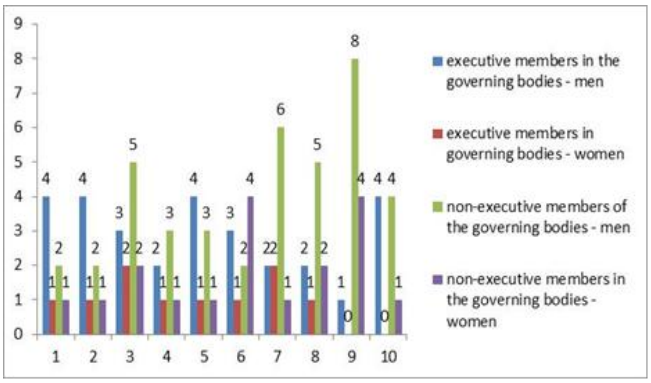
executive members in the governing bodies - men
executive members in governing bodies - women
non-executive members of the governing bodies - men
non-executive members in the governing bodies - women

Figure 7: Number of Men and Women as Executive and Non-Executive Members of Management Bodies in MBI10 Companies (Source: Authors' calculation)

In 4 out of the 10 companies listed on the MBI10 index, at least one president of the management or supervisory board/board of directors is a woman. In comparison, in the remaining 6 companies, there is no female president on these boards. Among the 10 MBI10 companies, only one has 50% female representation on its management and supervisory boards. In 4 companies, the proportion of female members ranges from 30% to 37.5%. In 4 other companies, the range is from 22.2% to 28.6%, and in one company, it is 11.1%.

Additionally, two of the 10 companies have no female executive members on their management bodies. Only one company has 66.7% of its non-executive members as women, while in the remaining companies, the proportion of female non-executive members is below 35%.

By the end of 2024, women will account for 29.9% of all members of the management and supervisory boards/boards of directors, and 21.1% of the chairpersons of these boards. This indicates that half of the MBI10 companies have already met provision 2.13 of the Corporate Governance Code in 2024, which requires at least 30% female membership on boards of directors, a requirement officially set to be fulfilled by 2025.

Considering the data, it can be concluded that 25.6% of executive members of management bodies are women, while 31% of non-executive members are women. Overall, women represent 28.9% of all members of management and supervisory boards.

This indicates that the Republic of North Macedonia has not yet met the requirements of Directive (EU) 2022/2381, which mandates that by 30 June 2026, members of the underrepresented sex must occupy at least 40% of non-executive director positions and at least 33% of all director positions, including both executive and non-executive directors.

Considering that the deadline for achieving these targets is 30 June 2026, the current level of gender balance can be considered satisfactory.

Gender Representation in Management Bodies: Largest Companies in North Macedonia and the Western Balkans

This section provides a comparative analysis of women's participation as presidents of the highest decision-making bodies, that is, the supervisory board (in two-tier governance systems) or the board of directors (in one-tier systems), of the largest listed companies in North Macedonia (MBI10), Bosnia and Herzegovina (BTAX, SASX-10, BIRS), Montenegro (MNSE10), and Serbia (BELEX15), as Western Balkan countries, based on data published by the European Institute for Gender Equality. No data are available for Albania and Kosovo for the parameters mentioned above.

The European Institute for Gender Equality collects data for all positions on a biannual basis, typically in April (B1) and October (B2). This analysis was conducted for 2023, as no data are available for any of these countries for 2024 in the database. The analysis included data for all 10 companies comprising the national stock indices in North Macedonia, Bosnia and Herzegovina, and Montenegro, as well as data for 9 out of the 15 companies included in the Serbian stock index (BELEX15), according to the European Commission database.

The following figures present the percentage of women serving as presidents and members of supervisory boards or boards of directors in the largest listed companies in the countries under review during the analyzed period.

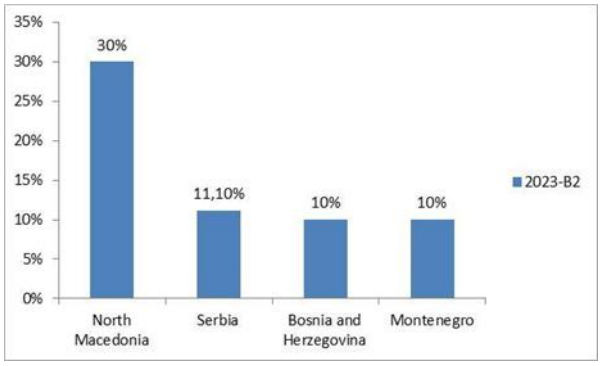

Figure 8: Percentage of Women Serving as Presidents of Supervisory Boards or Boards of Directors in the Largest Listed Companies Across Selected Western Balkan Countries (Source: European Institute for Gender Equality 2025)

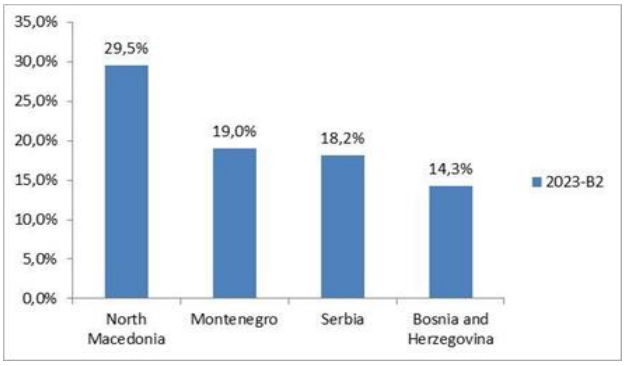

Figure 9: Percentage of Women Serving as Members of Supervisory Boards or Boards of Directors in the Largest Listed Companies in Selected Western Balkan Countries (Source: European Institute for Gender Equality 2025)

According to the data in Figures 8 and 9, it can be concluded that the largest companies in the Republic of North Macedonia have the highest percentage of women serving as presidents and members of management and supervisory boards/boards of directors compared to the largest companies in Serbia, Bosnia and Herzegovina, and Montenegro, all of which are Western Balkan countries and EU candidate states.

Gender Representation on Boards in the Largest Listed Companies in North Macedonia and the European Union

This section provides a comparative analysis of women's participation as presidents and members of the highest decision-making bodies, that is, the supervisory board (in two-tier governance systems) or the board of directors (in one-tier systems), of the largest listed companies in North Macedonia and the EU-27 average (from 2020), comparing North Macedonia with all EU Member States. These analyses are based solely on the most recent year.

The following figures present the percentage of women serving as presidents and members of supervisory boards or boards of directors in the largest listed companies in North Macedonia and the EU average in 2024.

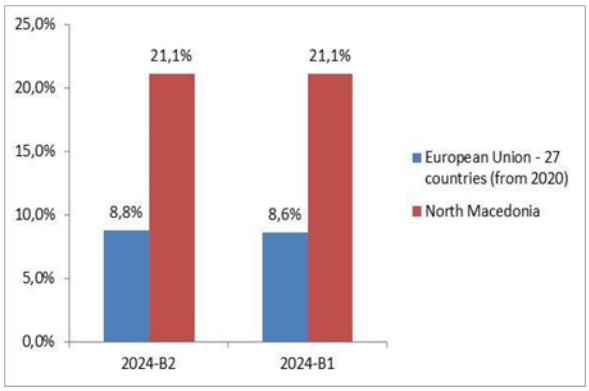

Figure 10: Participation of Women as Presidents of Supervisory Boards or Boards of Directors in the Largest Listed Companies in North Macedonia and the EU Average (Source: European Institute for Gender Equality 2025)

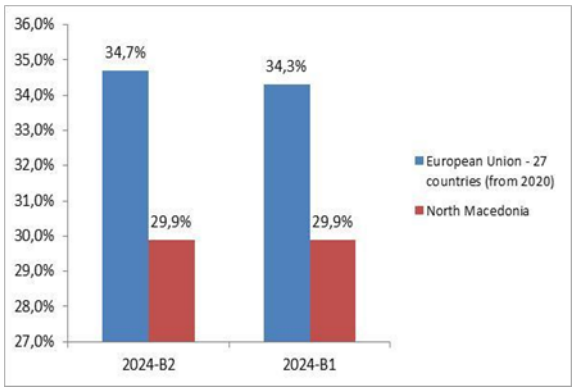

Figure 11: Participation of Women as Members of Supervisory Boards or Boards of Directors in the Largest Listed Companies in North Macedonia and the EU Average (Source: European Institute for Gender Equality 2025)

The data in the figures show that in 2024, the percentage of women serving as chairpersons of management bodies in the largest listed companies in North Macedonia is higher than the EU-27 average for the same positions (from 2020). Conversely, the percentage of women serving as members of management bodies in North Macedonia's largest listed companies is slightly lower than the EU-27 average for members of supervisory boards or boards of directors in the largest listed companies (from 2020).

The following figure shows the percentage of women serving as chairpersons of supervisory boards or boards of directors in the largest listed companies in North Macedonia and across all EU countries in 2024.

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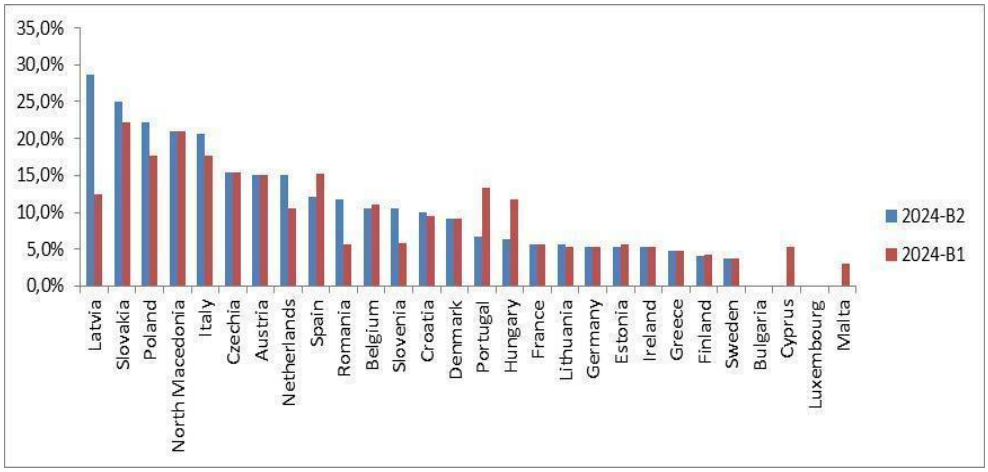

Figure 12: Participation of Women as Presidents of Supervisory Board/ Board of Directors of the Largest Listed Companies in North Macedonia and the European Union (Source: European Institute for Gender Equality 2025)

Considering the data in Figure 12, it is evident that only three EU countries have a higher percentage of women serving as chairpersons of supervisory boards or boards of directors in the largest listed companies than North Macedonia. This means that approximately 89% of EU countries have a lower percentage of women in these positions compared to North Macedonia. Additionally, four EU countries have no women serving as chairpersons, and 15 EU Member States have less than 10% female participation in these roles.

The following graph presents the percentage of women serving as members of supervisory boards or boards of directors in the largest listed companies in North Macedonia and across all EU countries in 2024.

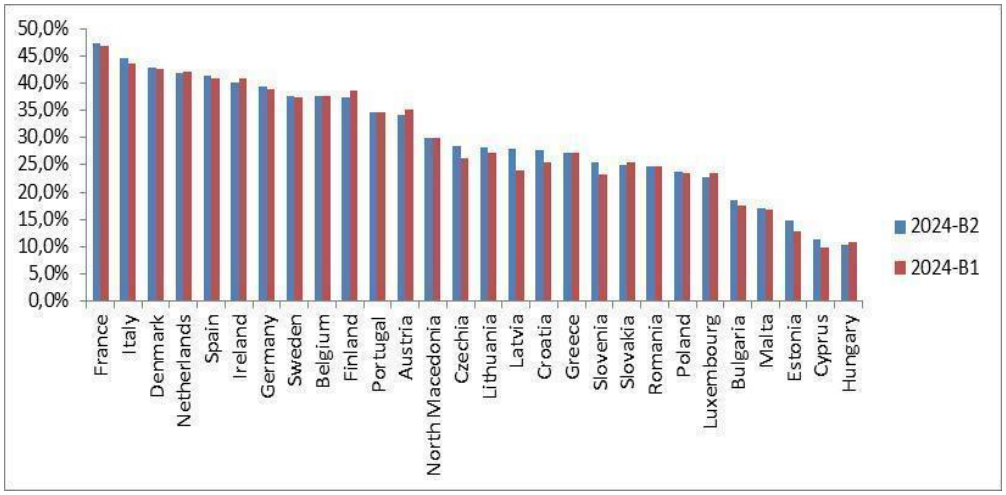

Figure 13: Participation of Women on the Supervisory Boards and Boards of Directors of the Largest Listed Companies in North Macedonia and the European Union (Source: European Institute for Gender Equality 2025)

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As illustrated in Figure 13, twelve EU Member States have a higher percentage of women serving as members of supervisory boards or boards of directors in the largest listed companies than North Macedonia. Approximately 56% of EU Member States have a lower percentage of women in these positions, meaning the same proportion of countries have less than 30% female participation as members of supervisory boards or boards of directors in the largest listed companies.

CONCLUSION

The constitutional principle of equality affirms that all citizens of the Republic of North Macedonia are equal in their freedoms and rights, regardless of gender, race, skin color, national or social origin, political or religious beliefs, property or social status. Economic and social rights further guarantee equal access to any employment position, as well as fair and equitable remuneration for all employees. These rights must be developed, strengthened, and practically implemented across all sectors, including corporate boards.

The research indicates that the participation of women in the governing bodies of listed companies has steadily increased from 24.2% in 2020 to nearly 27% in 2024. However, the representation of women as executive directors or chairpersons of boards of directors has remained stable at around 16% over the same period. These statistics suggest that Macedonian listed companies must further promote diversity in their governing and supervisory boards to achieve the target of 30% female representation.

According to 2024 data for companies in the MBI10 index, women hold 25.6% of executive roles and 31% of non-executive positions within management bodies. A comparative analysis in 2023 reveals that North Macedonia leads the Western Balkans, outperforming Serbia, Bosnia and Herzegovina, and Montenegro in terms of women's participation as presidents and members of management and supervisory boards. Moreover, in 2023, the country recorded a higher gender balance among board chairpersons than the EU average, while female representation as members of management bodies remains slightly below the EU average.

On average, listed companies in North Macedonia have not yet fully complied with Directive (EU) 2022/2381 or the Corporate Governance Code. However, compared to Serbia, Bosnia and Herzegovina, and Montenegro, Macedonian listed companies have demonstrated better gender balance. A limitation of this research is that the analysis focused solely on the largest listed companies, which may differ from those of other companies. Additionally, the forthcoming requirement for companies to report compliance with the Corporate Governance Code in 2025, as well as the EU deadline of 30 June 2026, may influence future gender balance outcomes. These factors should be considered in future research on the impact of the Corporate Governance Code and Directive (EU) 2022/2381. Given that North Macedonia has not adopted a mandatory gender quota for corporate boards and that not all listed companies are obliged to report compliance with the Corporate Governance Code, achieving gender balance requires stronger legal mechanisms. A clear legal framework mandating gender quotas for all listed companies, rather than just some, would ensure greater representation of women in top management positions.

The forthcoming Law on Trade Companies presents an opportunity for the legislator to introduce such a provision, aligned with Directive (EU) 2022/2381. Aligning domestic legislation

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with EU Directives is not only a legal requirement in the context of North Macedonia's EU accession process but also a practical necessity to advance equality between women and men as a fundamental human right.

This approach would also fulfill North Macedonia's obligations under CEDAW and reinforce the country's commitment to the United Nations' 5th Sustainable Development Goal on gender equality. Such measures would ensure that guarantees of fundamental freedoms, gender balance, and equal remuneration are actively upheld in practice, rather than merely acknowledged in words.

Beyond legal obligations, government bodies, the private sector, employers' organizations, NGOs, and academic institutions should continue to implement the "Women in Power and Decision-Making" aspect of the Beijing Platform for Action (BPfA), adopted at the UN Fourth World Conference on Women in 1995. Thirty years later, this platform remains highly relevant and largely unfulfilled in North Macedonia. The fight for gender equality must continue until equal pay and equal access to all positions are fully realized.

Following the adoption of a gender quota in law, future research should assess whether mandatory quotas are more effective than soft law recommendations. Further studies could explore the impact of mandatory quotas on female representation in management boards, including potential correlations between the number of women on boards and companies' financial performance.

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CRediT AUTHOR STATEMENT

Emilija Gjorgjioska: conceptualization, investigation, writing – original draft, writing – review & editing, supervision. **Margarita Janeska:** conceptualization, investigation, formal analysis, methodology, visualization, supervision. **Tatjana Spaseska:** conceptualization, resources, writing – review & editing, supervision. **Aneta Risteska-Jankuloska:** conceptualization, investigation, writing – review & editing, supervision.

All authors have read and agreed to the published version of the article.

COMPLIANCE WITH ETHICAL STANDARDS

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The authors acknowledge the use of AI tools—specifically ChatGPT-5—to assist in translating and enhancing the clarity and quality of the English language in this manuscript. These AI tools were employed solely for language refinement and were not involved in the conceptualization, analysis, or development of the scientific content. The authors assume full responsibility for the manuscript's originality, accuracy, validity, and integrity.

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The Weaponization of Energy Resources: Fossil Fuels as Instruments of Geopolitical Leverage in the EU–Russia Context

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Abstract
This paper examines how energy functions as a strategic instrument of geopolitical coercion, focusing on Russia's prolonged weaponization of natural gas and the European Union's evolving response. Building on Soviet-era infrastructure, Moscow has employed price increases, supply cuts, and control of pipelines to pressure states. At the same time, the EU has countered with sanctions, diversification of suppliers, and accelerated investment in renewable energy. For more than fifty years, energy has served as leverage that blurs the boundary between economics and security, imposing heavy economic and political costs on both producers and consumers. Interdependence amplifies these vulnerabilities, allowing energy to operate as a "weapon" on both supply and demand sides. Although the EU plans to end Russian gas imports by 2027, Moscow's continuing circumvention efforts demonstrate that energy remains a critical tool of power and national security worldwide.

Keywords
Energy Resources; Weaponization; Russia; European Union; Geopolitics; Sanctions; Interdependence

INTRODUCTION

The growing aggressiveness of Russia's foreign policy underscores the issue of its use of energy resources as a strategic tool to advance its interests. While Russia is not the only state that resorts to energy-based influence, pressure, or blackmail, its current foreign energy policy represents one of the most striking examples of the weaponization of energy.

Since the 1990s, Russia has gained extensive experience in using energy resources as a lever of influence, initially targeting post-Soviet states, and later rapidly expanding its reach across Europe, facilitated by the energy infrastructure inherited from the Soviet era. These actions are primarily politically motivated, although Russia almost always seeks to justify them on economic grounds.

Russia has repeatedly used energy as a weapon against EU Member States, as well as against EU candidate countries such as Ukraine and Moldova. In the 2020s, tensions surrounding the import and export of energy resources have reached their highest levels. While each party to this confrontation acts in accordance with its national interests, the values characteristic of the parties, whether democratic or neo-authoritarian, also play a significant role.

In recent years, the extreme vulnerability of many European countries due to their dependence on Russian fossil fuels has become increasingly evident. At the same time,

awareness of the need to break these toxic energy supply chains has been growing. Russia's full-scale invasion of Ukraine in February 2022 triggered a sharp intensification of the EU's efforts to achieve energy independence. The EU cannot ignore Russian actions such as targeted missile strikes on Ukraine's energy infrastructure, the destruction of the Kakhovka Dam, or the mining of the Zaporizhzhia Nuclear Power Plant, acts that exemplify the aggressive use of energy and energy infrastructure as weapons. The destruction of such infrastructure constitutes a clear violation of state sovereignty and independence (Graf 2014).

The restructuring of the EU energy system and the diversification of supply sources represent a test of resilience for EU institutions, national governments of member and candidate states, as well as industry, businesses, and households. Efforts to dismantle long-established energy ties with Russia face significant challenges, including a lack of solidarity among EU Member States on many energy-related issues. Nevertheless, the process is underway, and the EU, guided by its strategic interests, has also begun to weaponize energy resources in response to Russia's destructive energy policy. These developments clearly require further academic analysis.

This research aims to examine the use of energy resources by Russia and the EU as instruments of geopolitical confrontation. The study focuses on three objectives:

1. Investigating how energy resources are converted into instruments of coercion by states and alliances.
2. Evaluating whether energy weaponization is exclusive to neo-authoritarian regimes or also practiced by democratic states and alliances.
3. Analyzing the reciprocal use of energy as a geopolitical tool by Russia and the EU.

The working hypotheses of this study include:

1. Energy resources serve as a form of weapon employed by states and alliances, generating significant political consequences.
2. The weaponization of energy resources is not exclusive to neo-authoritarian regimes; democratic states and their alliances also utilize such strategies.

The study applied a neo-institutionalist methodology to test this hypothesis. Using this framework, it analyzed the energy-based interdependence between the EU and Russia to examine how natural gas evolved into a geopolitical weapon, notably as their relationship shifted from interdependence to destructive dependence.

LITERATURE REVIEW

Despite the risks associated with using energy as a weapon in international relations and the numerous references to this issue in the literature on energy security, a systematic study of energy weaponization did not emerge until the 2010s. In 2010, the American think tank Council on Foreign Relations was among the first to call for an investigation into the relationship between energy supply (primarily fossil fuels) and political decision-making (Levi 2010).

M. C. LaBelle (2023) argues that energy has served as a weapon for more than half a century, beginning in 1973, when the Organization of the Petroleum Exporting Countries (OPEC) used oil as a weapon against Western countries that supported Israel during the Yom Kippur

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War (p. 531). According to LaBelle, energy was once again weaponized in 2022 within the context of modern armed conflicts. LaBelle conceptualizes energy as 1) a tool used to exert pressure on sovereign states and 2) a multidimensional resource reflecting deeper connections within the political and economic structures of international relations. It is agreed with LaBelle's view that, both in the 1970s and in the 2020s, energy trade has been employed as a demonstration of power and as a means of undermining the sovereignty of independent states.

It is further argued that the weaponization of energy today extends beyond trade and is now manifested through a broad spectrum of actions and processes. These include the destruction of energy infrastructure, the forcible seizure of fossil fuel sources and other energy assets, sabotage of energy facilities, high-level political blackmail over energy supply, cyberattacks, and coercion targeting energy professionals. As a result, the range of both actions and inactions that may be classified as energy weaponization has expanded significantly in the contemporary geopolitical context.

Sonmez and Cobanoglu (2016) examined the use of energy resources as a foreign policy instrument, focusing specifically on Russia as a case study. Their research, conducted well before the current aggressive manifestations of Russian energy blackmail and terrorism, nevertheless demonstrated the centrality of the energy sector to Russian political power. Even a decade ago, it was evident that Russia's economic and geopolitical influence had grown, driven in part by the strategic use of energy resources, particularly amid rising oil prices. Accordingly, Russia began to pursue a more assertive foreign policy on a global scale. Sonmez and Cobanoglu's conclusion, that the Russian government extensively exploits energy resources as a foreign policy tool, remains both compelling and relevant today.

Research institutions and think tanks across Europe have devoted considerable attention to the issue of energy weaponization. This focus is understandable, given Europe's long-standing dependence on fossil fuel supplies from Russia. However, only after the onset of Russia's full-scale invasion of Ukraine did the diversification of both energy sources and supply routes significantly accelerate, serving as a strategic response to Russia's weaponization of energy. In this context, the research conducted by the Danish Institute for International Studies is particularly noteworthy. The findings of Slakaityte and Surwillo (2024) on Russia's use of natural gas blackmail offer especially valuable insights.

Boute (2022) examines the problem of energy weaponization through the lens of entrenched resource dependencies and the geopolitical leverage exercised by key actors in the international system. He emphasizes the urgent need for reforms in the field of energy security to prevent the use of energy resources as instruments of coercion. From his perspective as a legal scholar, reforms in international energy, trade, and investment law are essential to allow states to safeguard their energy security and counter energy weaponization in the evolving geopolitical landscape.

Long before the escalation of tensions in the 2020s, Smith Stegen (2011) posed the question of "whether Russia would use energy as a weapon to influence the policies of EU Member States and obtain political concessions," (p. 6505) even predicting potential models of Russian manipulation. It is argued that Stegen's formulation was influenced by Russia's already evident tendency to use energy as a weapon against Ukraine, as such practices have been documented since the first gas conflict in 1993 and in subsequent gas disputes.

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Lior (2021) demonstrates that fossil fuels have frequently served as tools of foreign policy throughout world history. Nonetheless, it remains insufficiently clear how energy functions as an instrument of international relations, influencing security and geopolitics. Lior emphasizes that future theoretical and empirical research on energy resources should focus on the diverse applications of various energy types as instruments of foreign policy by individual states, as well as their broader impact on global politics.

The review of literature on energy weaponization reveals: 1) a growing interest in the topic, reflecting the critical importance of energy resources to modern societies; 2) an expanding scope covering a wider variety of energy resources employed as weapons; and 3) the utilization of energy weaponization not only by undemocratic governments but also by democratic actors.

The events unfolding in the 2020s regarding the role of energy resources in political processes are highly dynamic, underscoring the need for ongoing study and a reassessment of existing approaches in light of emerging trends and challenges. This study examines the strategic use of energy resources as a weapon by both undemocratic actors (e.g., Russia) and democratic entities (e.g., the EU and individual EU Member States).

METHODS

For scientific analysis, it is essential to identify the most suitable theory of international relations for studying energy resources as instruments of international policy. For a long time, the theoretical and methodological foundations for examining the weaponization of energy remained uncertain, resulting primarily in the use of descriptive methods and historical analysis to determine the role that energy resources may play in foreign policy. Some researchers have also applied geopolitical analysis. An example is "The Prize: The Epic Quest for Oil, Money, and Power" (2008) by Daniel Yergin, which is regarded as valuable for deepening the understanding of energy security issues and energy diplomacy, although a clear paradigm for analyzing the aggressive use of energy resources to achieve objectives in international policy is not offered in this work.

Energy resources as material elements of power in the realm of international relations are analyzed through both realism and idealism (Luft and Korin 2009, 340). However, these approaches differ significantly. Realists argue that, throughout human history, energy resources—including rare earth metals and minerals essential for green energy production—have held strategic value. They have repeatedly been used primarily by exporting states as instruments of foreign policy and have served as catalysts for armed conflicts. Idealists, in contrast, view energy market participants as rational actors motivated by profit maximization rather than conflict. Consequently, they downplay the influence of geopolitical, security, value-based, cultural, and other factors. Today, however, the significance of these factors is evident. This considerably undermines the position of idealism and strengthens the case for neorealism in the study of the weaponization of energy resources.

It is assessed that the theory of neorealism provides the most appropriate methodological foundation for analyzing the role of energy resources in foreign policy. Neorealism holds that energy resources can function as instruments of foreign policy pressure. Such instruments are employed when particular actors in international politics seek to expand their influence or secure specific concessions from other actors. Although realism is commonly

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associated with hard power, its material, non-military basis can take various forms, energy resources being a prime example. A range of scholars supports this view. For instance, Legro and Moravcsik (1999, 18) rightly note that control over material resources, including energy, lies at the heart of realism in world politics.

It is acknowledged, following Česnakas (2010), that realist theories provide a valuable starting point for moving beyond purely descriptive approaches in the study of energy resources in foreign policy. Energy resources are treated as material objects within a materialist ontology. Accordingly, the realism paradigm is considered particularly suited for analyzing the weaponization of energy resources.

Long before the current escalation of global instability, Klare (2009) warned of a "potential war between major powers" (p. 40) over control of energy resources. In such a scenario, energy resources would become targets of military action. Klare argues that states are prepared to use military force to secure these resources. This is driven by factors such as rising production levels and population growth, which make modern states increasingly dependent on a certain amount of energy resources. Under contemporary conditions, energy resources have emerged as a critical material determinant of state power.

The realism paradigm centers on the role of states as the primary actors shaping energy relations on a global scale. States are generally unwilling to relinquish control over energy resources to international energy companies, free market mechanisms, or supranational organizations. The majority of large oil and gas companies are state-owned, controlling 75-80% of the world's fossil fuel reserves (Sustainable Finance Observatory 2019). Energy-exporting states are not only consolidating their control over these resources but are also increasingly using them as tools to advance their national foreign policy interests.

The above suggests that the idealistic paradigm is ill-suited to explain the processes of energy resource use in international politics, as states remain the primary actors shaping energy policy. Energy resources have already become instruments in the pursuit of state power. Realism, however, cannot fully explain why some energy-rich states utilize their resources as tools of pressure in international relations, while others refrain from doing so.

Neorealism, as an evolution of classical realism, focuses on the international system as a whole but often struggles to explain behavior at the level of individual states. Understanding the role of energy resources in foreign policy requires analysis at the unit level, since states are not as homogeneous as neorealists assume. Consequently, neorealism faces challenges in fully accounting for the role of energy resources in international politics. This recognition contributed to the development of defensive realism and offensive realism.

Defensive realism posits that states seek to enhance their international influence primarily to ensure their own security. They resort to various means of strengthening their influence, including the weaponization of energy resources, not because their power has necessarily increased, but because they feel insecure or act preemptively in response to security challenges. In this framework, the central motive for states is security, with the understanding that increasing their influence enhances their security. From the standpoint of defensive realism, states are inclined to pursue different forms of expansion when their security is perceived as vulnerable.

Undemocratic states provide vivid examples of this behavior. For instance, in response to international sanctions related to its aggressive policy toward Ukraine, Russia imposed

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conditions on the supply of its energy resources to "unfriendly states," beginning with demands for payment in rubles for exported gas. Similarly, Iran has repeatedly threatened to block the Strait of Hormuz in response to Western sanctions; in June 2025, its parliament approved a bill to close this crucial channel. This is a significant example of the weaponization of energy resources, as more than one-fifth of the world's oil supplies pass through the Strait of Hormuz on a daily basis. Algeria offers another example: it has repeatedly reduced or blocked gas supplies through the Maghreb–Europe Gas Pipeline (also known as the Pedro Duran Farell pipeline) via Morocco to Spain due to political disputes over Western Sahara.

Offensive realism, which has been developing since the early 2000s, rests on the idea that "security in the international system is scarce" (Orban 2008, 15). Accordingly, "security requires acquiring as much power compared to other states as possible" (Elman 2007, 18; Labs 1997). This means that power equates to security for states. Since security is very limited, states compete to acquire as much power as possible to ensure protection against other states. In offensive realism, security is primarily defined by military power. In contemporary practice, however, states use a wide range of tools to consolidate their positions, and the weaponization of energy resources is one of them. Energy resources can become decisive for military power because they allow for the financing of the defense sector and the waging of wars; Russia provides a clear example. Furthermore, energy resources pave the way for economic prosperity, and the financial power of the state can easily be transformed into military potential (Orban 2008, 15). Offensive realism methodologically contributes to understanding the role of energy resources in the foreign policy of energy-exporting states, since the income from the sale of these resources is used to enhance military readiness and strengthen military power.J. Mearsheimer argues that states can never truly be secure and that only through power maximization can states ensure their survival (Mearsheimer 2001, 61).

It is worth noting that in the scientific discourse, researchers also point to the other models of realism, such as neoclassical realism, and emphasize their adaptability for studying the processes of weaponization of energy resources. Setting aside methodological debates about the directions of realism, we come to the understanding that this conceptual approach is appropriate for analyzing the issues of the weaponization of energy resources as instruments of foreign policy.

RESULTS

Weaponizing Energy in Contemporary International Politics

The strategic significance of energy resources for the functioning of any state and society represents both a source of strength and a potential vulnerability. Consequently, these resources become instruments in the hands of international policy actors seeking to achieve specific foreign policy objectives and are subject to political negotiation. Geopolitical competition among states is increasingly evident in the energy sector. This struggle is waged not only over energy resources themselves, but also through the deployment of energy infrastructure, skilled personnel, and advanced energy technologies.

The concept of energy as a weapon entails the use of trade in energy resources, including oil, gas, coal, fuel oil, and electricity from the power grid, as a tool to achieve political,

diplomatic, or other strategic goals. This often manifests as the termination or restriction of energy supplies, the refusal to import energy for non-commercial reasons, the unilateral imposition of significant price increases contrary to prior agreements, the establishment of control over energy infrastructure, or targeted damage to such infrastructure. This list is not exhaustive, as there are numerous additional methods by which energy can be wielded as a strategic instrument.

The use of energy resources as a weapon can generate significant political consequences, including encroachments on state sovereignty aimed at controlling the extraction and distribution of natural resources. The weaponization of energy involves leveraging energy resources, infrastructure, and related assets as instruments of coercion and power in the international arena, with motivations that can vary widely. Typical manifestations include price wars, manipulation of energy supplies, the imposition of sanctions, unlawful seizure and control of other states' energy facilities, and the sabotage of energy infrastructure. Both producer and consumer states, as well as transit states, resort to energy weaponization. Energy resources serve as a primary foreign policy tool in non-authoritarian states, where rents from fossil fuels significantly influence foreign policy priorities (Khoma and Vdovychyn 2024). Democratic actors also employ this tool, albeit with different objectives and mechanisms.

Energy can function as a weapon on both the supply and demand sides of the market. The weaponization of energy inevitably produces economic, political, and social losses, and in extreme cases, may pose direct threats to human life and health. It can take the form of a business strategy grounded in specific values and principles, or manifest as energy terrorism. In the context of open, non-hybrid armed conflicts, such as the Russian-Ukrainian war, energy weaponization can reach extreme levels, including the demolition of energy facilities, destruction of generation capacity, and provocation of large-scale artificial disasters, as exemplified by attacks on nuclear reactors.

The control exercised by certain states (particularly non-democratic ones) over energy infrastructure and the supply of energy resources carries significant strategic implications. While the risks associated with such control have long been recognized, they have often been underestimated. Given the economic and social importance of energy, supply disruptions can pose a threat to stability at all levels. This potential for destabilization is precisely what states exploit when employing energy pressure, blackmail, or even acts of energy-related terrorism. Nevertheless, the politicization of energy also generates positive outcomes: it creates incentives to explore new energy sources and diversify supplies, thereby mitigating the risks associated with reliance on a single provider.

Fossil fuels constitute a critical component of the foreign policy toolkit of neo-authoritarian states. Russia is a striking example of this. Scientific literature already presents approaches to the content of a neo-authoritarian regime and reveals the foreign policy of states with this type of regime (Glukhova 2019; Khoma and Nikolaieva 2023; Khoma and Vdovychyn 2024; Krastev 2011; Lewis 2020; Lührmann and Lindberg 2019; Wiatr 2019). In such states, rents from fossil fuel exports contribute to aggressive foreign policy behavior. Revenues from fossil fuel exports are primarily directed toward the development of the defense-industrial complex, the accumulation of weapons stockpiles aimed at other states, and arms exports supporting neo-authoritarian regimes. Energy-rich neo-authoritarian states utilize energy exports defensively: to prevent external interference, ensure regime survival, and promote neo-

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authoritarian influence abroad. Consequently, these states use energy resources both as instruments of coercion against other states and as mechanisms of punishment for perceived hostile or critical behavior. This strategic application of energy allows non-democratic regimes to insulate themselves from external pressure, pursue repressive domestic policies, and conduct destabilizing foreign policies with relative impunity.

From another perspective, democratic states that purchase energy from neo-authoritarian regimes inadvertently reinforce non-democratic governments and, in doing so, undermine the stability of democracy.

The confrontation between the EU and Russia in the 2020s is by no means the first instance of energy resource weaponization in recent history. In 1973, Arab states halted oil exports to the United States and other Western countries that supported Israel in conflicts with its Middle Eastern neighbors (Zakariah 2011). The supply cutoffs were designed to inflict economic losses on adversaries and extract political concessions. OPEC explicitly employed oil as a weapon against Western states backing Israel during the 1973 Yom Kippur War (LaBelle 2020, 533). Following the outbreak of the conflict, Arab OPEC Member States agreed to leverage oil supplies strategically against pro-Israel Western countries. The oil embargo was primarily a political measure: OPEC nations reduced oil production not only to influence global prices in their favor, but also to achieve broader political objectives, principally to exert pressure on the international community to curtail Western support for Israel.

The embargo and subsequent surge in oil prices precipitated a severe economic crisis in the West, with oil prices increasing from $2.90 to $11.65 per barrel in 1974 (Corbett 2013). Oil thus became a weapon of energy diplomacy, deployed against pro-Israel governments in the West. Energy diplomacy has manifested itself here as a sphere of international relations focused on the use of energy resources and technologies as instruments of political influence. European countries were particularly affected, given OPEC's control of approximately two-thirds of the world's proven oil reserves. The crisis prompted Western states to reconsider aspects of energy security, though many institutional and regulatory mechanisms to address such vulnerabilities remained underdeveloped at the time.

It is worth noting that, in recent history, numerous states have utilized oil as a political instrument, and the examples are not limited to 1973 (Hafner, Raimondi, and Bonometti 2023). Historically, the United States has imposed more oil embargoes than any other country, including an embargo against Japan prior to World War II (Crane et al. 2009). Importantly, political motives are not always the primary driver behind the weaponization of energy resources. For instance, Saudi Arabia has at times flooded the market with cheap oil to penalize rival oil-exporting states such as Iran and Russia. A notable example is the 2020 economic dispute, initiated by Saudi Arabia to punish Russia for its refusal to reduce oil production and thereby stabilize global oil prices during the COVID-19 pandemic (Ma, Xiong and Bao 2021). Each instance of energy resource weaponization, therefore, exhibits distinct characteristics.

Thus, energy has become a contemporary instrument of coercion, used to exert pressure on sovereign states and alliances. Trade in energy resources serves not only as a demonstration of power but also as a means to encroach upon the sovereignty of other states.

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Prerequisites for Russia's Use of Energy as a Weapon

Currently, Russia serves as the primary example of energy resource weaponization. Prior to 2022, Europe was heavily reliant on natural gas imports from Russia. For natural gas, the EU's import dependency was 84% in 2020. Russia was the largest supplier of gas to the EU; for example, in 2020, more than 40% of the EU's total natural gas imports came from Russia (Di Bella et al. 2024). Over the past several years, Russia has relied on limiting gas flows to EU Member States, while the EU has, in turn, restricted Russia's access to its energy markets. Both actions exemplify the strategic use of energy as a coercive tool and have generated significant economic and political repercussions.

It is important to recognize that the weaponization of energy resources by Putin's regime did not emerge recently, but has its roots in the Soviet period. For example, in 1968, a Soviet-Austrian agreement was signed for the supply of gas from the USSR to Austria, under which Austria provided pipelines and financing for their construction, while the USSR committed to supplying gas (Iber and Huber 2024). Similarly, in 1970, the Federal Republic of Germany concluded an agreement with the USSR regarding the supply of natural gas in exchange for the construction of gas pipelines (Schattenberg 2022). These examples illustrate the emergence of the USSR as a European energy powerhouse. The expansion of oil and gas pipeline networks provided the Soviet regime with strategic advantages by creating a system of energy-dependent states in Central and Eastern Europe (Högselius 2013). Industries and households across many European countries became heavily reliant on Soviet, and subsequently Russian, energy resources (Högselius 2013; LaBelle 2020; Ostrowski 2022). The energy supply chains established since the 1960s are now disintegrating (Gustafson 2020; Högselius 2013). This primarily affects Central European states that were once part of the Warsaw Pact, as well as the sovereign states of the Baltic region, Moldova, and Ukraine.

The result of the rapprochement between European states and Russia on the energy front was the growth of interdependence between European states and the USSR. The Soviet regime received hard currency from the export of oil and gas resources, even though these revenues helped finance an aggressive foreign policy. It refers to the war in Afghanistan from 1979 to 1989, which the USSR partially financed, thanks to the income from the sale of fossil fuels (Gaidar 2007; Gustafson 2020, 143; LaBelle 2023, 533-534).

Oil and gas resources differ from imports of other goods (such as diamonds or furs) because of their importance to the smooth functioning and upward dynamics of the economy. At that time, European states considered the benefits of interdependence to outweigh the cost of their own energy independence (Keohane and Nye 1989, 9-10).

Regarding the states that were part of the USSR, the Soviet regime applied energy pressure on the eve of the actual collapse of the USSR. In particular, in 1990, the supply of oil to the future independent Baltic States was interrupted (Collins 2017). It was an unsuccessful attempt to suppress the nascent independence movement of the region. In the following years, Russian gas production and distribution corporations, as well as state-owned oil and gas companies, began to manipulate the prices and physical volumes of crude oil and natural gas supplies (Newnham 2011). Moreover, this was usually done under conditions of political tension to put pressure on consumers. Such examples have occurred over the past three decades in Georgia, Estonia, Lithuania, Moldova, Turkmenistan, Belarus, Slovakia, Poland, and Ukraine.

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The basis of most such manipulations is geopolitics rather than corporate profitability. Sharp fluctuations in gas prices closely correlate with political developments. Oil and gas are strategic commodities for Russia, as they are for other neo-authoritarian states, so energy policy decisions are never made in a geopolitical vacuum.

Ukraine illustrates the latter thesis. It is worth noting that, for the first time, Ukraine received gas in September 1993 in exchange for part of the Black Sea Fleet, thereby weakening its position (Kuzio and D'Anieri 2018). As soon as geopolitical tension between Ukraine and Russia escalated in various years of the post-Soviet era, it immediately impacted the oil and gas sector. Thus, during the presidency of the pro-Western V. Yushchenko, who strengthened cooperation with the EU and NATO, there were two such crises: 1) in March 2005; 2) in December 2008 (Stern 2006; The Russian–Ukrainian Gas Dispute 2009). Following the annexation of Crimea, Gazprom increased the price of gas exported to Ukraine from $268.50 to $485 per 1,000 m^3 (Umbach 2014).

Long before Russia's full-scale invasion of Ukraine, researchers warned that from a security perspective, threats that destabilize the supply of energy resources are severe for European states (Bouzarovski, Bradshaw and Wochnik 2015). In 2009, under the influence of Russia's invasion of Georgia (August 2008), intellectuals of Central and Eastern Europe (Wałęsa, Havel, Krastev, etc.) wrote an open letter to the administration of Barack Obama (Gazeta Wyborcza 2009). It expresses concerns about Europe's dependence on Russian energy resources. The letter emphasizes that the threat to energy supplies can harm the political sovereignty of Central and Eastern European states. For the signatories, the issues of sovereignty, military threats, and energy security were seen as an interconnected whole. In 2014, Russia's violation of Ukraine's territorial integrity and sovereignty, with subsequent energy supply problems, confirmed what European intellectuals had warned about. The warning of former Polish Prime Minister D. Tusk in the spring of 2014 should also be paid attention to: "Regardless of how the standoff over Ukraine develops, one lesson is clear: excessive dependence on Russian energy makes Europe weak" (Collins 2017, 1).

Significant revenues from fossil fuels over the past two decades allowed Russia to rapidly develop its defense-industrial complex and build up weapons that have been directed against Ukraine since 2014 and are also used in other countries of the world, and exported to support neo-authoritarian regimes. Consequently, oil and gas resources are a significant factor in Russia's aggressive foreign policy, from the war in Afghanistan to the conflict with Ukraine. Russia is a state where fossil fuel rents contribute to its aggressive foreign policy (Van de Graaf and Colgan 2017, 59).

Russia's behavior in relation to energy resources is determined not only by the wealth of its subsoil but also by the extensive system of pipeline networks, which was partially created during the Soviet era. This has created a system in which third countries are dependent on Russia for the supply of energy resources. Such energy dependence has created wider economic and political dependence and has become a source of power for the Putin regime. Let us recall Colgan's term "petro-aggression" to describe a situation in which states where oil accounts for more than 10% of GDP are 250% more likely to instigate military conflicts with other states (Colgan 2010, 2013). Russia's weaponization of energy is part of the government's "divide and rule" strategy. It was, and still is, strategically important for Russia to dominate the EU energy market and influence political decisions through its control of energy resources.

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Russia's Weaponization of Energy Against the EU

Russia is the world's largest exporter of natural gas, the second-largest exporter of oil, and the third-largest exporter of coal (International Energy Agency 2020). Like other energy-rich undemocratic states, Russia uses its energy wealth for at least three purposes: 1) to obtain economic benefits; 2) to support, expand, and exercise political influence within its sphere of interest; and 3) to exert political pressure on importing countries.

In the case of the EU, Russia has long leveraged its position as a major energy supplier to advance its strategically important interests. The network of energy connections with consumers, transit states, and consumer states was so complex that, after the annexation of Crimea and the beginning of the Russian-Ukrainian war in 2014, the EU did not even impose sanctions on the energy sector of the aggressor state (Korteweg 2018). Experiencing actual impunity, Russian corporations such as Rosneft and Gazprom continued to abuse their dominant market position in pursuit of their strategic goals.

The question of the price of energy resources and the uninterrupted supply of them has always been closely tied to Russia's foreign policy priorities. There are instances in which Russia lowered the price of energy sources or postponed payments, only to cancel these concessions once the political environment shifted. Furthermore, the contract terms prevented gas buyers from reselling the resource to a third party or from purchasing gas through an alternative pipeline route. In particular, in 2006 and 2009, the price of gas was changed for Ukraine. Discriminatory pricing was also applied to the Baltic States after they acceded to the EU, and to Moldova after the arrival of a pro-Western government in 2021, among others. These contract terms allowed Russia to maintain a fragmented European market, and Gazprom offered different prices to different buyers. This policy of using the export of energy resources for intimidation is a demonstration of Russian realpolitik.

In 2021, Russia restricted gas supplies in order to force the EU to withdraw its support for Ukraine and to obtain the lifting of sanctions. For example, in the fourth quarter of 2021, the Russian company Gazprom reduced its gas exports to the EU by 25% compared to the same period in 2020 (Milov 2022). Russia referred to energy blackmail, demanding that the certification of Nord Stream 2 be expedited. This is an example of Russian "energy games," which took place simultaneously with Russia's build-up of the army near the borders of Ukraine.

After Russia's full-scale invasion of Ukraine and the EU's introduction of several waves of sanctions, the energy blackmail by Russia intensified. For example, in June 2022, the supply of natural gas through the Nord Stream 1 gas pipeline had already been reduced by 75%. In July 2022, the supply was suspended for 10 days, and in August 2022, the pipeline was finally shut down. In a speech on August 8, 2022, Putin spoke about the potential catastrophic consequences for the global energy market (Sheppard and Polina 2022) in response to the sanctions imposed against Russia, and once again turned energy into a weapon. Similarly, the sanctions imposed by Europe and its allies on Russia created their own energy weapon on the demand side.

A sudden interruption of energy supply is also an example of the weaponization of energy resources. For example, RAO Nordic, a subsidiary of the Russian energy company Inter RAO, has not supplied electricity to Finland since May 15, 2022 (Reuters 2022b). The Russian side explained this by problems with payment for the consumed energy, but in fact, it is one of

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Russia's responses to Finland's sanctions policy. In this case, Russia's actions did not have a significant impact on consumers because only 10% of Finland's electricity consumption came from Russia, and the government quickly found an alternative. Another example is Gazprom's decision in April 2022 to halt gas supplies to the natural gas distribution companies Bulgargaz (Bulgaria) and PGNiG (Poland) due to non-payment in rubles, which is indicative of the weaponization of energy resources (Deutsche Welle 2022).

Russia expected that the artificially created energy crisis would become a point of division within the EU. However, this did not happen, although the impact of Russian gas blackmail was primarily felt through reductions in household income, declines in industrial production, and similar effects. With Putin-style statements such as, "We will not supply gas, oil, coal, heating oil – we will not supply anything," and threats to "freeze Europe" (Reuters 2022a), Russia demonstrated its use of fossil fuels as a weapon. Shortages and supply interruptions seriously harmed the European economy and created a threat to the legitimacy of governments, which can be seen as an encroachment on Europe's energy sovereignty. By reducing supplies, Russia placed EU states in an economically vulnerable position and threatened the political legitimacy of EU institutions and national governments.

Another example of Russia's use of energy as a strategic tool is its nuclear energy program. Russia remains one of the leading actors in the global nuclear sector. However, the international community has not sufficiently addressed the potential risks posed by its dominance in the nuclear technology market. This sector has largely escaped EU sanctions, and some countries, including France and Hungary, have, for various reasons, blocked the imposition of restrictions on the Russian nuclear industry, including Rosatom. Rosatom has been active in the international nuclear energy market for many years and is recognized as a major provider of critical services for reactor construction projects. Through its subsidiary TVEL, Rosatom supplies nuclear fuel, controlling 38% of the global uranium conversion capacity and 46% of the uranium enrichment capacity (Szulecki and Overland 2023). Russia has been a key supplier of approximately half of all international agreements related to nuclear power plant construction, reactor and fuel provision, and the decommissioning or disposal of nuclear waste. Its direct control over numerous nuclear reactors and strategic energy infrastructure provides a basis for exerting political leverage.

Currently, Russia's use of energy resources as a weapon is yielding negative consequences for itself, including economic losses and constraints on its geopolitical influence. For instance, Russian oil is currently selling at roughly half the global reference price, and the lengthy and costly transport routes to China and India significantly reduce state revenues. Thus, the weaponization of energy can ultimately backfire on those who attempt to wield it.

The EU's Weaponization of Energy Against Russia

Although the EU is primarily a consumer rather than a supplier of energy resources, it nonetheless exerts leverage and inflicts losses due to interdependencies in oil and gas. These dynamics vividly illustrate how fossil fuels can be employed as instruments of coercion by actors with differing values, objectives, and political regimes. Since Russia annexed Crimea in 2014, the EU has implemented sanctions and embargoes targeting companies in the oil and gas sector,

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including Rosneft, Gazprombank, Vnesheconombank, Novatek, and Feodosiia Enterprise for the Supply of Oil Products, among others (European Commission 2025).

In December 2022, the EU introduced a price cap on crude oil, followed by a cap on Russian oil products, including diesel and fuel oil, in February 2023. By leveraging its institutional and regulatory capacities, the EU inflicted financial harm on the aggressor state. Russia's energy sovereignty, its right to sell fossil fuels, was thereby challenged, generating a broad spectrum of geopolitical and economic risks. The Russian strategy of exploiting interdependence with European states, established as far back as the 1970s, to impede the EU's full support for Ukraine has thus been met with a firm and coordinated countermeasure.

Individual EU Member States, both independently and in coordination with others, have employed energy as a tool of coercion against Russia. For instance, the Baltic States completely ceased importing electricity from Russia (Fang et al. 2024). Transmission system operators in Estonia, Latvia, and Lithuania decided to disconnect from the Russian-controlled network and synchronize with the continental European grid, ENTSO-E. In parallel, the Baltic States collectively withdrew from the BRELL agreement[1], which was concluded with Russian and Belarusian operators. On February 9, 2025, the Baltic States completed synchronization with the Continental European grid.

It is noteworthy that since 2009, the EU has maintained a special mechanism for reviewing energy projects, commonly referred to as the Gazprom clause[2]. This mechanism requires Member States to assess the energy security risks posed by non-EU investors in their national transmission systems. On this basis, Germany suspended the certification of the Nord Stream 2 gas pipeline in February 2022, pending a revised security assessment in light of Russia's invasion of Ukraine. Had it become operational, the Nord Stream 2 pipeline would have enabled Russia to further pursue aggressive political objectives through the use of energy as a weapon. The war in Ukraine prompted the European Commission to call for heightened vigilance regarding Russian and Belarusian direct investment, given the strong incentives for these governments to interfere in critical sectors of EU Member States' infrastructure (European Commission 2022).

It is essential to note that the energy relations between Russia and individual EU Member States exhibit distinct characteristics shaped by historical circumstances. Even in 2023, when the EU imposed an embargo on Russian oil and gas, certain exemptions applied to particular countries and products. These exceptions primarily concerned post-communist states that remain critically dependent on Russian supplies and currently lack viable alternatives (European Council 2023).

Energy as a weapon is already a reality. Arguments in support of this view were presented in the study. In this context, it can be concurred with Boute (2022), who states that

[1]The BRELL system, developed during the Soviet era, connected the energy grids of Belarus, Russia, Lithuania, Latvia, and Estonia. The BRELL agreement, signed in 1998, kept the Baltic states' energy networks synchronized with the Integrated Power System/United Power System, coordinated by a central dispatch in Moscow. This dependence created a significant political and economic vulnerability for the Baltic states (Tatarėlytė 2025).

[2]The "Gazprom clause" stipulates that non-EU companies cannot control transmission systems or transmission system operators unless: 1) there is an agreement between the European Union and the country where these non-EU companies are based, and 2) the companies can demonstrate that they are not influenced by an operator engaged in the production or supply of gas or electricity, or by a third country (Lexology 2025).

"with energy used as a weapon, reform of the liberal energy regime is needed to allow states to prevent the creation of dependencies and protect their energy security in the new geopolitical reality" (p. 740).

CONCLUSION

The study's findings demonstrate that, in contemporary international relations, states increasingly employ energy resources as instruments of influence and coercion to advance specific objectives. For at least half a century, energy has been used as a form of strategic leverage, exerting pressure on both sovereign states and alliances. While earlier instances of such practices were recorded, none approached the scale observed over the past fifty years.

Today, energy remains a critical lever in international affairs. The trade in energy resources functions not only as a means of projecting power but also as a mechanism for encroaching upon the sovereignty of other states.

The results of the study confirmed the working hypotheses: 1) Energy resources serve as a form of weapon employed by states and alliances, generating significant political consequences; 2) The weaponization of energy resources is not exclusive to neo-authoritarian regimes; democratic states and their alliances also utilize such strategies.

As interdependence among states in the energy sphere deepens, it carries the potential to inflict severe economic and political harm, disrupting households' livelihoods, eroding governmental legitimacy, and beyond. The principal methods of weaponization include terminating or restricting supplies, suspending imports for non-commercial reasons, unilaterally raising prices in violation of prior agreements, gradually consolidating control over energy infrastructure, or deliberately damaging such infrastructure. The weaponization of energy thus generates significant economic, political, and social costs.

Both producer and consumer states engage in the weaponization of energy. Energy can be wielded as a tool of coercion on both the demand and supply sides: not only the refusal to deliver resources but also the refusal to purchase them constitutes a form of energy weaponization. Such practices rarely occur unilaterally, and the EU–Russia case serves as confirmation of this. Russia has restricted supplies and raised the price of fossil fuels. At the same time, the EU has deployed its institutional leverage, depriving the aggressor state of vital revenues from its oil and gas sector.

It is essential to recognize that the current weaponization of energy under the Putin regime did not emerge abruptly. Its foundations were laid during the Soviet era, beginning in the 1960s. At that time, supply chains were established, and an extensive network of oil and gas pipelines and related infrastructure was constructed to deliver energy to what would later become EU Member States. Over time, this created a bloc of countries dependent on Soviet fossil fuels, even as Moscow pursued an aggressive foreign policy (for example, the war in Afghanistan) and maintained a non-democratic regime. Today, Europe's democratic states are dismantling energy supply chains that have been in place for decades, a process that exerts painful consequences on industry, households, governmental stability, and beyond.

The prospects for EU Member States to eliminate specific dependencies on Russia, such as in the nuclear sector, remain uncertain, and some EU Member States, even under current conditions, continue to cooperate with the aggressor state (for instance, Hungary). Nevertheless,

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a positive trend that emerged in 2023, and which also illustrates the weaponization of energy, is the agreement among a group of states to expel Russia from the international nuclear energy market.

Given that energy is, and will remain at least in the medium term, a strategic instrument of coercion, it is essential to formulate policies and develop infrastructure, both at the national and EU levels, that can mitigate or even preempt external leverage over governments and reinforce energy security within the new geopolitical reality. Russia's war against Ukraine has triggered a global reassessment of states' dependence on Russian energy and related infrastructure. While the EU is no longer as critically dependent on Russian resources as it was prior to 2022, it has yet to extricate itself from Moscow's influence fully. Moreover, EU Member States continue to diverge in their approaches to energy cooperation with Russia.

The EU's current commitment to phasing out Russian gas by 2027, as outlined in the updated REPowerEU roadmap, is a promising development. Similarly, the efforts of Member States to secure alternatives to Russian nuclear fuel are also promising. No new contracts for Russian gas imports will be concluded, and existing contracts are scheduled to expire by 2027. In parallel, another energy transition is underway, with biogas, biomethane, and other clean energy sources assuming an increasingly prominent role. Moreover, nearly every new package of anti-Russian sanctions now includes measures targeting the energy sector. Collectively, these steps could function as a safeguard against the weaponization of energy.

At the same time, it is essential to recognize that Russia continues to develop methods for circumventing Western sanctions. Tactics include the deployment of shadow fleets, man-in-the-middle schemes, traceability fraud, supply chain manipulation, and the establishment of shell companies. Given the critical role of energy revenues in sustaining the Russian economy, it is evident that the EU and other democratic actors must remain prepared to confront ongoing efforts at energy weaponization, even after the formal cessation of Russian gas imports.

The processes of weaponizing energy resources are likely to have far-reaching implications for both international relations and energy security. For international relations, these consequences may include: 1) the transformation of energy from a domain of mutually beneficial cooperation into a fully-fledged arena of geopolitical confrontation; 2) the further fragmentation of the political order, as energy resources reinforce the division of the world into blocs of democratic and neo-authoritarian states that approach energy in fundamentally different ways; and 3) the erosion of international legal norms and trust, resulting from manipulations of energy supplies.

For energy security, the potential consequences include: 1) the acceleration of diversification processes within the EU to minimize dependence on a single supplier; 2) the risk of excessive reliance on new energy partners; and 3) turbulence in energy markets, as weaponization generates price shocks, shortages, and instability.

Thus, the current weaponization of energy resources in Russia–EU relations transforms energy from an economic sphere into a geopolitical arena, creates new divisions in international relations, reshapes the structure of the EU's energy security, and simultaneously stimulates a global shift toward alternative energy sources. The politicization of energy-related decisions is intensifying: energy is increasingly regarded not merely as an economic commodity, but as an instrument of national security.

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The issue of weaponizing energy resources is highly dynamic, with new manifestations, actors, and instruments continually emerging. This study focuses on the most significant aspects of the weaponization of energy resources between the EU and Russia. Ongoing developments call for further assessment of this phenomenon in EU–Russia relations. Such developments include the adoption of new packages of anti-Russian sanctions, violations by Russian fighter jets of the security zone around drilling platforms in the Baltic Sea, and other forms of energy-resource weaponization.

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Strategic Trade Diversification: Engagement of the Visegrad Group with the Western Balkans

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Abstract
The Visegrad Group countries (Czech Republic, Poland, Hungary, and Slovakia) and the Western Balkan countries share strong historical trade and cultural ties, and their trade relations are becoming increasingly significant in the context of geopolitical changes and economic transformations in the region. Recent trends indicate growing mutual trade, and analysis of the Trade Complementarity Index reveals high trade compatibility, confirming the potential for effective cooperation. The Trade Intensity Index also shows high values, particularly for Hungary. This paper evaluates trade exchanges and examines the intensity and compatibility of economic relations, with a focus on the Visegrad Group countries' trade with Serbia, their key trade partner. The results suggest that enhanced cooperation between the regions could bring substantial economic benefits and strengthen regional stability and competitiveness.

Keywords
Visegrad Group; Western Balkans; Trade Relations; Regional Stability; International Affairs; Regional Cooperation

INTRODUCTION

Trade relations between the Visegrad Group (V4), comprising the Czech Republic, Hungary, Poland, and Slovakia, and the Western Balkans region, which includes Albania, Bosnia and Herzegovina, Montenegro, Kosovo, North Macedonia, and Serbia, are becoming increasingly significant from both European and global perspectives. Interest in these trade connections is growing rapidly, particularly due to geopolitical shifts and ongoing economic transformations across the region.

The Visegrad Group was established in the early 1990s to enhance cooperation and coordination among its members in domestic and international affairs, aiming to strengthen their collective influence. Closer economic collaboration between the V4 and the Western Balkan countries could bring mutual economic benefits, strengthen regional stability, and contribute to Europe's overall competitiveness. The growing interest in trade and investment relations in the region is driven not only by economic factors but also by political considerations, highlighting the importance of long-term sustainability and prosperity.

As EU Member States, the V4 countries engage with the Western Balkans through Stabilization and Association Agreements (SAAs), which aim to facilitate access to the EU market, support development, and pave the way for potential EU membership (European Commission 2023).

Diversifying trading partners, particularly beyond the EU, which dominates their foreign trade, is crucial for the V4 countries. Given its geographical proximity, cultural ties, and promising trade complementarities, the Western Balkans region could become a priority in future V4 export strategies.

The main aim of this paper is to evaluate trade exchanges between the V4 countries and the Western Balkan countries, as well as to analyze the development of the Trade Complementarity Index and Trade Intensity Index between the V4 countries and Serbia, considered the leading trading partner of the Western Balkans, to assess the potential for further trade growth.

This paper is part of broader research on the Visegrad Group countries, focusing on their economic relations and trade cooperation with third countries, as well as the possibilities for territorial diversification of their exports. The Western Balkan countries are considered a key region where the V4 could deepen mutual relations and intensify political dialogue, thereby enhancing overall cooperation. For the Western Balkan countries, such cooperation also represents a form of support in the EU accession process.

LITERATURE REVIEW

Trade relations between the Visegrad Group (V4) countries and the Western Balkans region are attracting growing interest in academic and political circles. Shaped by economic transformation, the European integration process, and historical ties, the V4 countries have the potential to expand their trade partnerships, investments, and knowledge-based cooperation. Meanwhile, the Western Balkans region is undergoing structural economic changes aimed at achieving EU membership, a key factor influencing trade dynamics between these regions. The Visegrad Group supports the EU accession of the Western Balkans, and, as Karadjoski and Ilik (2019) note, the Balkan countries constitute an important part of the European mosaic. However, in relation to these countries' EU accession efforts, Cvetanović et al. (2015) point out that, in addition to significant challenges, progress is slowed by a low level of innovation. Political instability, inefficiencies in the legal system, and underdeveloped fundamental institutions further hinder a complete transition to a market economy.

One of the key challenges affecting trade relations is the region's competitiveness and business environment. According to Milović et al. (2020), macroeconomic stability has a substantial impact on the global competitiveness of Western Balkan countries. Their analysis indicates that, although the competitiveness of individual Western Balkan countries improved during the period under review (2009–2017), some countries, particularly Bosnia and Herzegovina, continue to face significant challenges. Deteriorating macroeconomic indicators, political tensions in the region, and unresolved territorial disputes between Kosovo and Serbia further exacerbate the situation. It is also noted that inefficient public administration in the Balkan countries imposes an additional burden on the public budget. A comparative analysis by Savićević et al. (2023) concluded that Western Balkan countries lag behind Central and Eastern European (CEE) countries in both competitiveness and their level of integration into the globalization process.

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Zeneli (2014) highlights the region's limited integration into global trade and investment flows, which negatively affects the economic performance of the Western Balkan countries. These factors, combined with historical and cultural differences (Kovacevic et al. 2014), can pose barriers to trade relations. The Open Balkan initiative, which connects Albania, North Macedonia, and Serbia, appears to be a promising solution, fostering economic integration in the region and potentially helping to eliminate trade barriers, thereby enhancing cooperation between the Western Balkans and the V4 countries (Rikalović, Molnar, and Josipović 2022). Although it currently involves only three countries, the initiative can also serve as a bridging mechanism in the EU accession process, helping these countries overcome obstacles stemming from their trade agreements with the EU (Filipović and Ignjatović 2023). Jusufi and Bellaqa (2019) emphasize that political instability and ongoing tensions between individual states in the region pose serious risks to the long-term stability of trade cooperation, which is further hindered by tariff and non-tariff barriers within Western Balkan countries. However, a predictable regulatory environment and improved business conditions are necessary to ensure stable growth.

Trade relations between the Visegrad Group (V4) countries and the Western Balkans hold significant growth potential. However, further development will depend on removing market barriers, enhancing the business environment, and deepening economic integration. Key areas for growth include the agri-food sector, industrial production, energy, and digitalization, where the V4 countries can leverage their experience and expertise (Drieniková, Zubaľová, and Gordanová 2023). The agricultural sector, particularly in Serbia, demonstrates strong competitiveness (Matkovski et al. 2021) and offers significant potential for trade expansion with the V4 countries.

Thanks to economic, historical, and geographical ties, Serbia is the largest trading partner of the V4 countries in the Western Balkans region. However, it is not among their top global trading partners. Investment activities by the V4 countries in Serbia are relatively low compared to those of Western European countries; however, Hungary's investments are particularly significant, especially in the oil and financial sectors, as well as in the production and extraction of raw materials (Božić Miljković 2021).

While the geographical proximity of the Western Balkans to the EU offers trade advantages, persistent regulatory and political barriers continue to hinder more effective cooperation (Leka, Daku, and Jusufi 2022). Stabilizing the business environment, expanding regional trade initiatives, and increasing investments can significantly enhance trade exchanges between the V4 countries and the Western Balkans, fostering long-term and sustainable economic partnerships (Kittová and Steinhauser 2018).

Cooperation between the Visegrad Group and the Western Balkan countries is important not only from a trade perspective but also from a political standpoint. As Ilik (2022) argues, the Balkan countries aim to follow the example of the Visegrad group countries in fostering regional cooperation and learning from both the opportunities and challenges encountered in this process.

Few studies have examined the significance of trade exchange between the Western Balkans and the Visegrad Group. Therefore, as part of a broader study on trade and economic cooperation between the V4 countries and non-EU partners, this research seeks to contribute to the existing literature by providing a focused analysis of trade relations within this context.

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METHODS

The methodological approach of this paper combines both quantitative and qualitative methods to conduct an in-depth analysis of trade relations between the Visegrad Group (V4) countries and the Western Balkans region. This approach is designed to systematically analyze and quantify bilateral trade flows, examine the structural and institutional factors influencing these flows, identify existing and potential trade barriers, and suggest strategic areas for enhanced cooperation.

The analysis is primarily based on secondary data sourced from internationally recognized statistical databases, including Eurostat, the World Bank, the Organisation for Economic Cooperation and Development (OECD), and the United Nations Conference on Trade and Development (UNCTAD). In addition, a qualitative review of academic publications, economic research studies, policy briefs, and official government reports related to trade relations between the V4 countries and the Western Balkans was conducted.

In analyzing the collected statistical data, descriptive statistical methods were employed to identify key trends and patterns in trade flows, such as export and import volumes, trade balances, and the sectoral distribution of goods. Additionally, index methods were applied to quantitatively assess trade integration between the regions, primarily using the Trade Intensity Index (TII) and the Trade Complementarity Index (TCI).

The Trade Intensity Index (TII) is a key indicator for evaluating whether trade between two countries exceeds or falls below the level expected given their respective roles in global trade. Essentially, the TII measures the relative significance of a bilateral trade relationship in the context of global trade patterns. The index is mathematically expressed as follows:

$$\mathrm{TII}_{ij} = \frac{x_{ij}/X_{it}}{x_{iw}/X_{wt}} \tag{1}$$

Where:

x_{ij} – the value of exports from the first country to the second country
x_{wj} – the total value of exports from the first country to the entire world
X_{it} – the total value of world exports to the second country
X_{wt} – the total value of world exports

A TII value greater than 1 indicates that trade between the two countries is more intense than would be expected based on their overall global trade shares, reflecting a relatively strong bilateral trade link. Conversely, a value below 1 suggests weaker-than-expected trade ties, which may indicate untapped trade potential or the presence of trade barriers (Kašťáková 2017).In this study, the TII was used to evaluate trade relations between the V4 countries and Serbia, the primary trading partner in the Western Balkans. The index was also calculated in reverse, measuring Serbia's trade intensity with each V4 country, providing a reciprocal view of trade dynamics.

The Trade Complementarity Index (TCI) assesses the compatibility between a country's export structure and another country's import structure. It provides insights into whether the

types of goods that one country exports align with the types of goods that the other country typically imports. This makes the TCI a valuable tool for identifying mutual trade potential and assessing the feasibility of expanding trade. The index is mathematically expressed as follows:

$$\mathrm{TC}_{ij} = 100 \times \left(1 - \frac{\sum |m_{ik} - x_{jk}|}{2}\right) \quad (2)$$

Where:

x_{jk} - the share of product k in the total exports of country j
m_{ik} - the share of product k in the total imports of country i

A higher TCI value indicates greater complementarity and a higher potential for mutually beneficial trade. Conversely, lower values suggest overlapping or competing export profiles, which can limit trade potential without structural adjustments (Kašťáková 2021). While a high TCI indicates promising potential for trade expansion, it should be interpreted with caution, particularly when geographical distance, infrastructural gaps, or high transaction costs may restrict the realization of trade.

In this study, the TCI was calculated for bilateral trade flows between each of the V4 countries and Serbia, the dominant trade partner of the V4 countries in the Western Balkans.

The qualitative part of the methodology was essential for contextualizing the empirical results within broader economic, political, and institutional frameworks. It included a review of the literature, encompassing both academic sources and policy-related documents, to explore non-quantifiable factors influencing mutual trade (e.g., regulatory differences, customs procedures, political stability, trade policy orientation, infrastructural connectivity, and regional integration initiatives).

The qualitative analysis enabled the identification of structural and procedural barriers to trade, highlighted areas of strategic cooperation, and considered recent political developments and economic reforms in both regions, thereby enhancing the relevance of our findings.

The results obtained from both the quantitative and qualitative analyses were interpreted in the context of current economic trends, providing a comprehensive view of the current state and future possibilities of trade cooperation between the V4 countries and the Western Balkans region.

RESULTS

Trade relations between the V4 countries and the Western Balkans region represent a significant and strategic element of European integration and regional cooperation. These relations contribute not only to the economic growth, modernization, and stabilization of the Balkan countries but also play a crucial role in strengthening mutual trade ties and supporting broader European economic integration. The V4 countries benefit from their advantageous geographical location in Central Europe, as well as historically rooted diplomatic and economic contacts with the Balkan states, which together create highly favorable conditions for the further development of trade, cross-border investment, and long-term regional partnerships.

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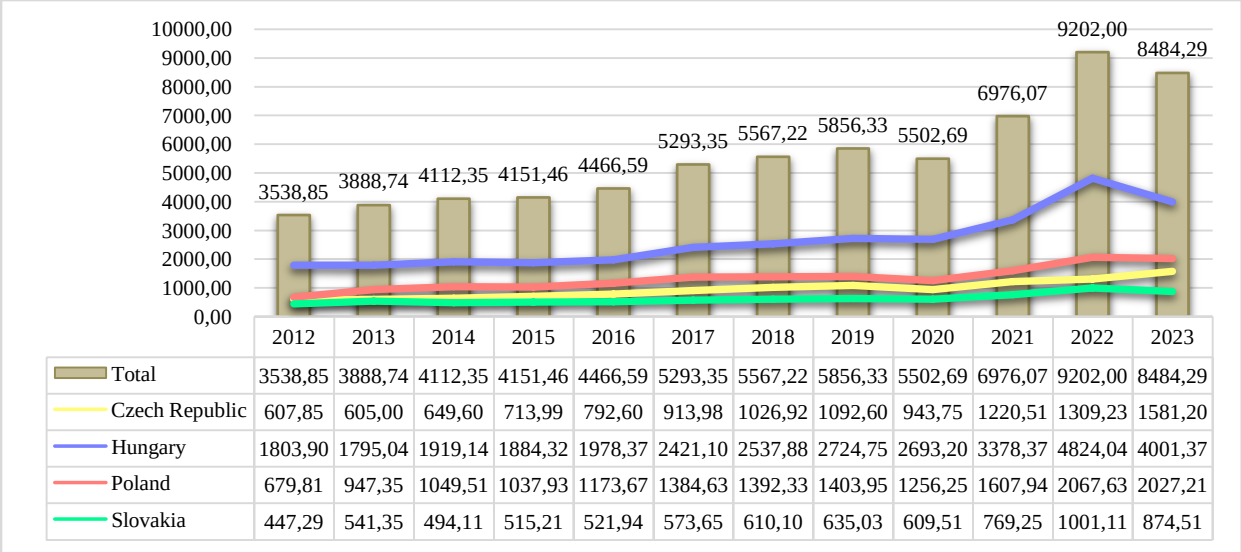
The Western Balkan countries, in turn, can draw on the V4's experience in the EU accession process, including implemented reforms and the application of trade agreements.

Trade relations between the V4 countries and the Western Balkans have shown steady growth and increasing dynamism over the past decade, with export volumes consistently rising and peaking in 2022.



	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Total	3538,85	3888,74	4112,35	4151,46	4466,59	5293,35	5567,22	5856,33	5502,69	6976,07	9202,00	8484,29
Czech Republic	607,85	605,00	649,60	713,99	792,60	913,98	1026,92	1092,60	943,75	1220,51	1309,23	1581,20
Hungary	1803,90	1795,04	1919,14	1884,32	1978,37	2421,10	2537,88	2724,75	2693,20	3378,37	4824,04	4001,37
Poland	679,81	947,35	1049,51	1037,93	1173,67	1384,63	1392,33	1403,95	1256,25	1607,94	2067,63	2027,21
Slovakia	447,29	541,35	494,11	515,21	521,94	573,65	610,10	635,03	609,51	769,25	1001,11	874,51

Figure 1: V4 Countries Export to Western Balkans in 2012-2023 (in million EUR) (Source: Own depiction, based on Trademap 2024 for Bosnia and Herzegovina, Montenegro, Albania, and North Macedonia, and ASK 2024 for Kosovo)

As documented in Figure 1, Hungary has consistently been the leading exporter from the V4 to the Western Balkans. Its export flows showed steady growth over the period under review, with a notable year-on-year increase in 2021, when exports exceeded €3.3 billion. This upward trend culminated in 2022, reaching a historic high of €4.8 billion. In 2023, total V4 exports declined, driven by decreases in all countries except the Czech Republic, which continued to strengthen its trade performance.

Despite minor year-to-year fluctuations, the Czech Republic maintained a consistent increase in exports to the Western Balkans throughout the analyzed period. The most significant growth occurred between 2020 and 2021, with exports rising from approximately €943 million to €1.2 billion, reaching over €1.58 billion in 2023. Poland also demonstrated steady growth, with the most dynamic increase recorded between 2012 and 2013. This upward trend continued in subsequent years, with Polish exports surpassing €2 billion in 2023.

Slovakia, while recording the lowest export values among the V4 countries, showed gradual progress, with the most significant year-on-year increase occurring in 2022, when Slovak exports to the region exceeded €1 billion for the first time.

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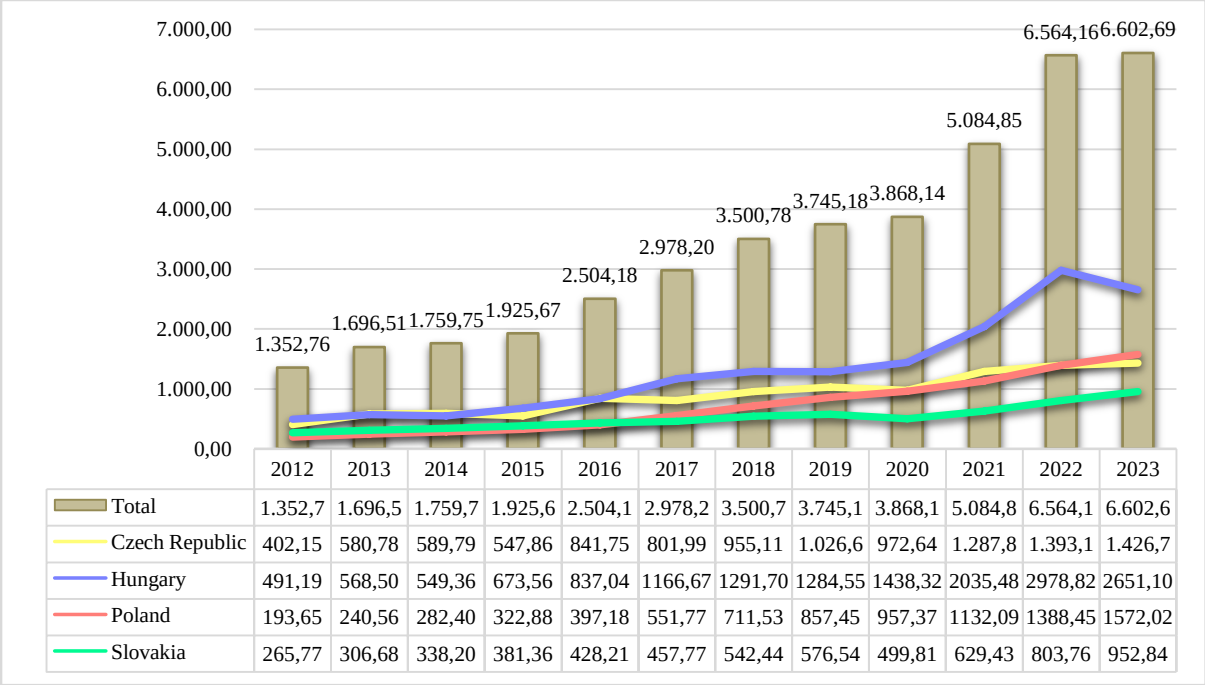


	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Total	1.352,7	1.696,5	1.759,7	1.925,6	2.504,1	2.978,2	3.500,7	3.745,1	3.868,1	5.084,8	6.564,1	6.602,6
Czech Republic	402,15	580,78	589,79	547,86	841,75	801,99	955,11	1.026,6	972,64	1.287,8	1.393,1	1.426,7
Hungary	491,19	568,50	549,36	673,56	837,04	1166,67	1291,70	1284,55	1438,32	2035,48	2978,82	2651,10
Poland	193,65	240,56	282,40	322,88	397,18	551,77	711,53	857,45	957,37	1132,09	1388,45	1572,02
Slovakia	265,77	306,68	338,20	381,36	428,21	457,77	542,44	576,54	499,81	629,43	803,76	952,84

Figure 2: V4 Countries Import from Western Balkans in 2012-2023 (in million EUR) (Source: Own depiction, based on Trademap 2024 for Bosnia and Herzegovina, Montenegro, Albania, and North Macedonia, and ASK 2024 for Kosovo)

As illustrated in Figure 2, imports by the V4 countries from the Western Balkans increased substantially between 2012 and 2022, rising from €1.35 billion to over €6.56 billion, and reaching €6.6 billion in 2023, despite reduced import volumes from Hungary and Slovakia. Hungary has consistently held the leading position in imports from the Western Balkans, reaching €2.65 billion in 2023, a sixfold increase compared to 2012. These trade dynamics underscore the robust economic ties between Hungary and the Balkan countries, positioning Hungary as a pivotal gateway for imports from the region into Central Europe.

The Czech Republic experienced consistent growth in imports, rising from €402 million in 2012 to €1.4 billion in 2023, with the highest growth rate occurring after 2020. Poland, initially the V4 country with the lowest import volume, steadily increased its imports, reaching €1.57 billion in 2023—an amount comparable to that of the Czech Republic. In contrast, Slovakia has consistently recorded the lowest import volume within the V4 group since 2017. Although its imports grew from €266 million in 2012 to €953 million in 2023, the pace of growth remained slower than that of the other V4 countries.

The following figure provides a detailed breakdown of each V4 country's share in total foreign trade with the Western Balkans in 2023.

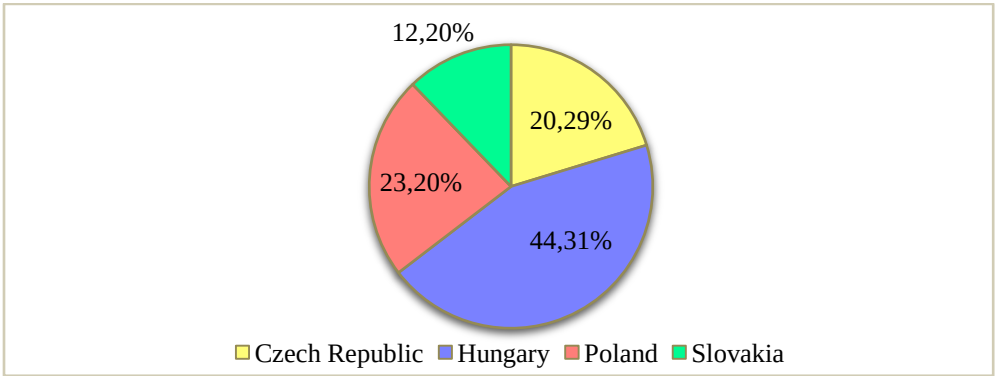
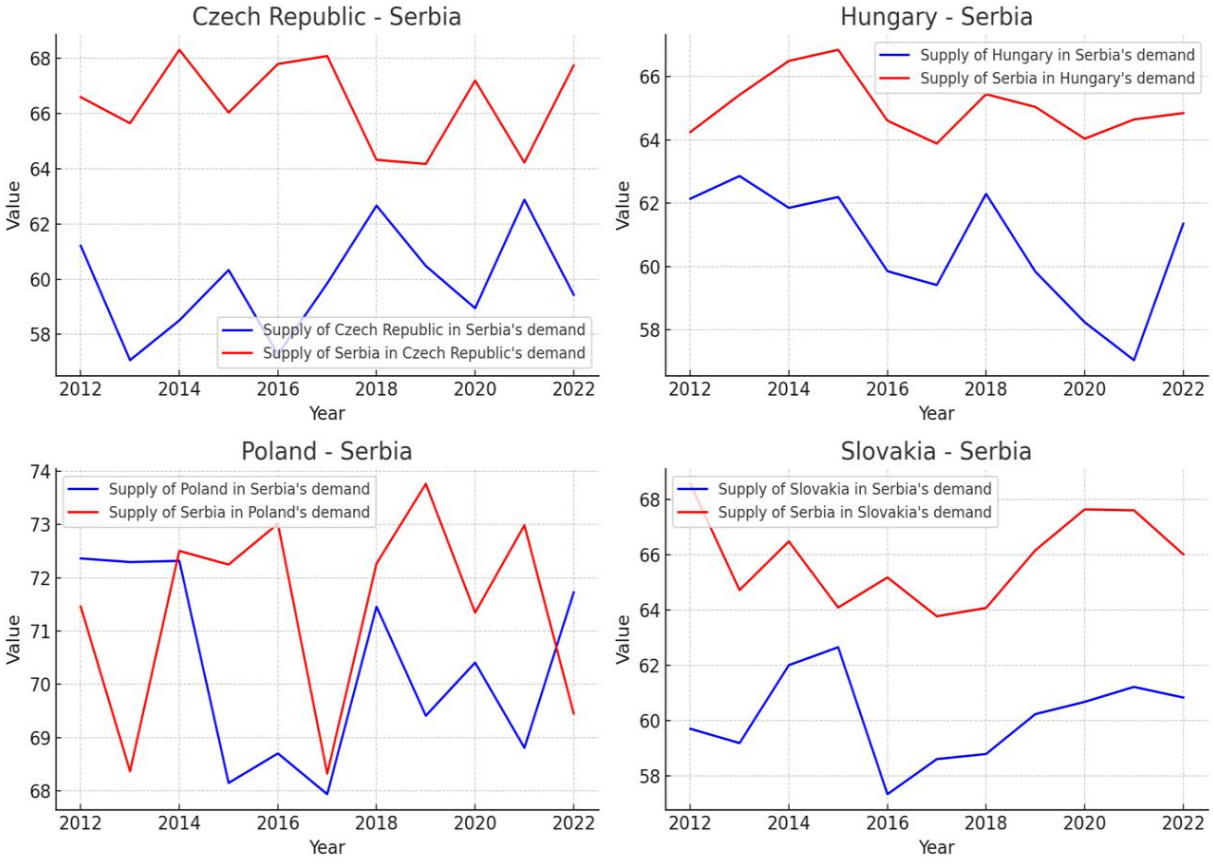


Figure 3: Share of V4 Countries in Foreign Trade with the Western Balkans in 2023 (in %)
(Source: Own depiction, based on Trademap 2024 for Bosnia and Herzegovina, Montenegro, Albania, and North Macedonia, and ASK 2024 for Kosovo)


Czech Republic - Serbia
Supply of Czech Republic in Serbia's demand
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Hungary - Serbia
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Poland - Serbia
Supply of Poland in Serbia's demand
Supply of Serbia in Poland's demand
Slovakia - Serbia
Supply of Slovakia in Serbia's demand
Supply of Serbia in Slovakia's demand
Value
Year

Figure 4: Development of Trade Complementarity (TCI) between V4 Countries and Serbia (2012-2022)
(Source: Own depiction, based on Trademap 2023)

As indicated in Figure 3, Hungary is the most significant trading partner within the V4 group for the Western Balkans, accounting for 44.31% of total trade. This share reflects the strong economic interconnectedness between Hungary and the Western Balkans, underscoring its leading role in economic exchange between the regions. Poland follows with a 23.20% share, and the Czech Republic ranks third with a 20.29% share. Slovakia, although holding the lowest share at 12.20%, is gradually strengthening its participation in trade with the region, creating opportunities for further intensification of economic cooperation.

The Trade Complementarity Index (TCI), as shown in Figure 4, suggests that trade compatibility between Serbia and individual V4 countries remains relatively high, with TCI values in most cases exceeding 50. This indicates that the examined countries can be considered relatively strong and compatible trade partners.

The trade complementarity between the Czech Republic and Serbia has remained strong, with Serbia's supply exceeding Czech demand and vice versa. TCI values from Serbia's perspective ranged between 63 and 69. In contrast, from the Czech side, the figures ranged between 57 and 62.5, confirming the long-term compatibility between the export and import structures of these two countries. However, in 2014 and 2016, there was a slight decrease in TCI from the Czech perspective, indicating a temporary weakening of trade alignment during those years (TEPSA 2022). Nevertheless, trade cooperation between the two countries remains at a high level, offering further potential for growth.

Serbia's supply met Hungary's demand for most of the period, with TCI values ranging from 59 to nearly 67 and peaking in 2017. In contrast, Hungary's export compatibility with Serbia showed greater fluctuations (55–63), particularly in 2016 and 2017, when complementarity declined (OECD 2021). Despite these fluctuations, Hungary remains one of Serbia's key trading partners, with growing cooperation in the infrastructure and energy sectors (Interreg VI-A IPA Hungary–Serbia 2023).

Trade complementarity between Poland and Serbia underwent significant changes between 2016 and 2019. During this period, the TCI from Poland's perspective reached its lowest values, while the TCI from Serbia's perspective was at its highest. By 2019, TCI values from both perspectives converged, reflecting improved balance in trade compatibility (Serwis Rzeczypospolitej Polskiej 2023). Poland's TCI ranged from 64 to 71, while Serbia's varied from 66 to nearly 74. Poland views Serbia as a promising trade partner, particularly in the e-mobility, infrastructure, and IT sectors. Notable examples include the delivery of eco-friendly Polish buses to Novi Sad and a joint aviation project in Belgrade (ITA 2022).

In the case of Slovakia, Serbia played a more significant trade role for Slovakia than Slovakia did for Serbia. Serbia's TCI values remained stable between 65 and nearly 69, while Slovakia's TCI ranged from 52 to 32, with notable declines in 2014 and 2016, indicating a temporary weakening of trade compatibility (MZV SR 2022). Despite these fluctuations, values remained above 50, confirming high potential for further trade cooperation. Slovak companies have already undertaken successful investments in Serbia, particularly in the renewable energy, IT, and infrastructure sectors. Significant projects include the construction of a geothermal water park near Bački Petrovac and the expansion of Webglobe, a Slovak IT company that acquired three Serbian web hosting firms (Forbes 2022).

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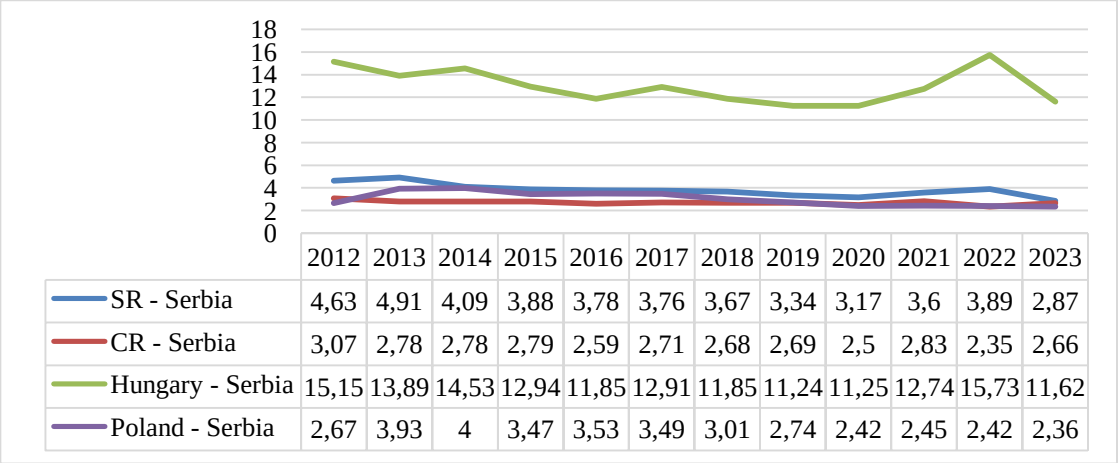
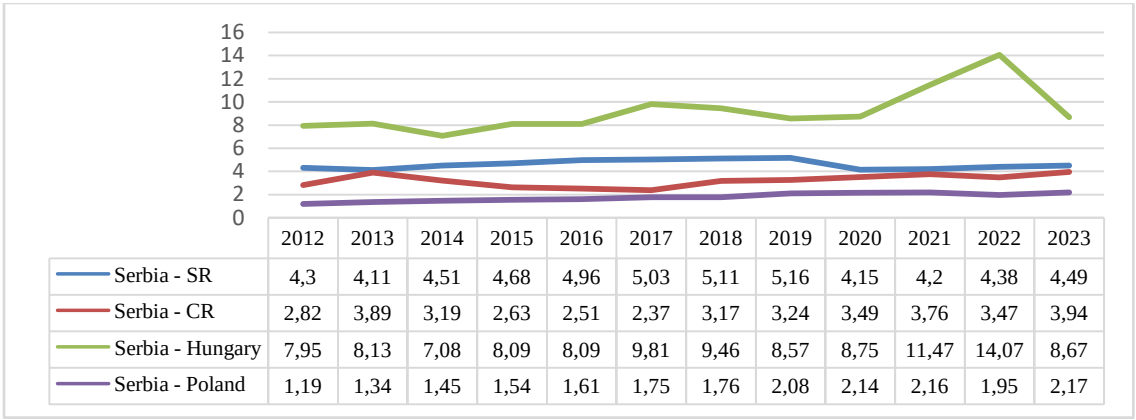


	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
SR - Serbia	4,63	4,91	4,09	3,88	3,78	3,76	3,67	3,34	3,17	3,6	3,89	2,87
CR - Serbia	3,07	2,78	2,78	2,79	2,59	2,71	2,68	2,69	2,5	2,83	2,35	2,66
Hungary - Serbia	15,15	13,89	14,53	12,94	11,85	12,91	11,85	11,24	11,25	12,74	15,73	11,62
Poland - Serbia	2,67	3,93	4	3,47	3,53	3,49	3,01	2,74	2,42	2,45	2,42	2,36

Figure 5: Development of TII between V4 Countries and Serbia (2012-2023)
(Source: Own depiction, based on Trademap 2024)

A comparison of trade intensity between the V4 countries and Serbia, as shown in Figure 5, highlights Hungary's dominant trade ties with Serbia, with its TII markedly surpassing that of the other V4 countries, despite a decline to 11.62 in 2023. A modest decline in trade intensity is also observed for the other V4 countries during the period under review; however, their TII values remain relatively high, oscillating between 2.36 for Poland, 2.66 for the Czech Republic, and 2.87 for Slovakia in 2023.



	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Serbia - SR	4,3	4,11	4,51	4,68	4,96	5,03	5,11	5,16	4,15	4,2	4,38	4,49
Serbia - CR	2,82	3,89	3,19	2,63	2,51	2,37	3,17	3,24	3,49	3,76	3,47	3,94
Serbia - Hungary	7,95	8,13	7,08	8,09	8,09	9,81	9,46	8,57	8,75	11,47	14,07	8,67
Serbia - Poland	1,19	1,34	1,45	1,54	1,61	1,75	1,76	2,08	2,14	2,16	1,95	2,17

Figure 6: Development of TII between Serbia and V4 countries (2012-2023)
(Source: Own depiction, based on Trademap 2024)

As indicated in Figure 6, the TII between Serbia and the V4 countries demonstrates strong trade ties, particularly with Hungary, which reached record levels in 2021 (14.07) and 2022 (8.67). Serbia's trade with Slovakia remained consistently high and stable throughout the period. Trade intensity with Poland and the Czech Republic gradually increased over the entire period under review, although Serbia's trade with Poland remained the lowest among the V4 countries, at 2.17 in 2023. Movchan, Giucci, and Roncada (2023) identified several non-tariff barriers that importers to the Western Balkans may encounter. These include, among others:

1. Procedural obstacles at customs, including delays in the release and clearance of goods and a lack of trade information. While Serbia and North Macedonia have joined the EU common transit system with standardized customs documents, other Western Balkan countries continue to use their own systems.
2. Sanitary and phytosanitary requirements for agricultural imports: Recognition of standards between the EU countries and the Western Balkans has not yet been fully established, and countries face high costs for obtaining the certifications and documentation required to comply with EU standards and regulations.
3. Payment system limitations. Not all Western Balkan countries have joined the Single Euro Payments Area (SEPA), which increases the costs of financial transactions (Jovanović 2024; Grieveson 2025).

The EU has launched the Growth Plan for the Western Balkans, which, if effectively implemented, could simplify trade between the V4 countries and the region. The plan is structured around four main pillars: the first pillar supports integration into a Common Regional Market, a regional single market with free movement of goods, services, people, and capital, serving as a preparatory step toward EU membership. The second pillar focuses on improving access to the EU internal market, the third provides financial assistance to support the Western Balkans, and the fourth targets reforms needed to align with EU standards (Jovanović 2024).

While tariff barriers have been eliminated through the Stabilization and Association Agreements (SAAs), challenges persist in the form of political instability, legislative barriers, and infrastructure deficiencies, all of which negatively affect the business environment and trade in the region. One key issue is the slow implementation of economic reforms necessary for sustainable growth and integration into European structures. Inefficient management of reforms, combined with high administrative burdens, hampers public administration efficiency and delays the EU accession process. Weak political support and limited administrative capacity hinder the implementation of essential reforms, resulting in longer approval processes, increased uncertainty for businesses, and a less favorable overall business environment (TEPSA 2022).

Another major challenge is excessive bureaucracy, which complicates business processes in the region. High administrative burdens, permitting procedures, and various regulatory obstacles prolong business operations and increase trade costs. These factors slow the movement of goods across borders and reduce the competitiveness of local companies (OECD 2021).

Underdeveloped transport infrastructure also represents a significant barrier to trade and economic growth in the region. Road and rail networks in countries such as Bosnia and Herzegovina, Albania, and Kosovo are often outdated and insufficient in terms of capacity (European Parliament 2022).

Political instability and regional conflicts further affect trade exchange and economic development in the Western Balkans. Tensions between Serbia and Kosovo create trade barriers, while political uncertainty discourages foreign direct investment. Ethnic divisions and administrative fragmentation in Bosnia and Herzegovina further complicate the coordination process. Additionally, low trade exchange between the Balkan countries limits the region's overall economic potential (Visegrad Insight 2022).

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Another challenge is China's growing influence in the region, primarily through the Belt and Road Initiative, which focuses on infrastructure development. China views the Western Balkans as a strategic gateway to Europe and uses bilateral agreements to finance and construct large infrastructure projects. However, these projects are often accompanied by accusations of non-transparency, corruption, and environmental risk (Balkan Insight 2021). Chinese investments have also been criticized for creating debt burdens that threaten the economic stability of some countries. For example, in Montenegro, a Chinese loan to finance a highway increased government debt from 63% to 80% of GDP, causing significant financial strain. China's strategy aims to strengthen economic dependence and potential political influence in the region. The Western Balkans also serve as a key transit route for goods from the Greek port of Piraeus to the European Union, raising concerns about potential Chinese interference in future EU policies (The Diplomat 2024).

In addition to Chinese influence, Russia continues to play a significant role in the region, particularly in Serbia. Serbia is the only country in the Western Balkans that refused to impose sanctions on Russia following its invasion of Ukraine in 2022, reflecting deep-rooted political and economic ties between the two countries (European Parliament 2022).

DISCUSSION

The analysis revealed a growing trade exchange between the V4 countries and the Western Balkans. Within the V4 group, Hungary has the strongest trade presence in the region, accounting for 44.3% of total V4 trade with the Western Balkans, followed by Poland (23.2%), the Czech Republic (20.3%), and Slovakia (12.2%). Serbia was identified as the most significant trade partner, leading to a focus on its trade relations in the analysis of the complementarity index and trade intensity.

Hungary maintains a strong trade position, with its Trade Intensity Index (TII) reaching 11.62 in 2023, significantly outperforming the other V4 countries, whose TII values remained below 2.9. Nevertheless, TII values for all countries are lower compared to the baseline year of 2012, indicating a decline in trade intensity over time. Conversely, Serbia's TII with individual V4 countries showed an upward trend, with the highest values observed with Hungary and the lowest with Poland.

The results of the Trade Complementarity Index (TCI) analysis revealed that Serbia generally holds higher TCI values (over 60) in its trade relations with the V4 countries than vice versa, with the highest TCI reported in trade with Poland (70.43). This indicates that Serbia has greater potential to increase exports to the V4 countries than the other way around. In 2022, Poland's TCI with Serbia surpassed 71, while the values for the other V4 countries remained above 50, reflecting strong trade complementarity and significant potential for further growth.

The strong trade connection, particularly between Hungary and Serbia, is evident through their extensive trade and economic cooperation. However, further expansion of trade relations between the V4 countries and the Western Balkans faces several challenges. While tariff barriers have been eliminated through the EU's Stabilization and Association Agreements (SAA), other obstacles persist. We agree with Filipović and Ignjatović (2023), Jusufi and Bellaqa (2019), and Leka, Daku, and Jusufi (2022) that non-tariff barriers and additional challenges—including political instability and regional conflicts, legislative obstacles such as slow

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implementation of economic reforms, bureaucracy, and infrastructure deficiencies—may negatively impact the business environment and trade dynamics in the region. These factors can influence the volume and stability of trade exchanges between partners.

As noted by Rikalović, Molnar, and Josipović (2022) and Kittová and Steinhauser (2018), regional initiatives have the potential to enhance trade cooperation, particularly through the elimination of trade barriers. While Milović, Jocović, and Martinović (2021) identified the Western Balkans' lower ranking in the Global Competitiveness Index as a barrier to trade, our analysis uncovers substantial potential for expanding trade with the V4 region, especially among those Western Balkan countries that exhibit positive trade complementarity indices with the V4.

CONCLUSION

The V4 countries' strategic efforts to diversify their trade activities beyond the European Union could be supported by focusing on the Western Balkan countries, with which they share historical ties. Our analysis confirms both the growth of trade exchanges and the existing potential for further trade development on both sides. Hungary maintains the strongest trade links with the region due to its strategic geographic location, historical connections, and established diplomatic and economic partnerships. In contrast, the other V4 countries remain less engaged in trade with the Western Balkans, despite the significant untapped potential the region offers. Among the Western Balkan countries, Serbia shows the most significant potential for deeper trade cooperation with the V4, as reflected in the level and growth of trade intensity.

However, the deepening of trade cooperation faces several challenges. Beyond internal obstacles, the region is increasingly influenced by external geopolitical dynamics. China has intensified its engagement in the Western Balkans through the Belt and Road Initiative, financing large-scale infrastructure projects, including highways, bridges, and railroads, that promise immediate economic benefits. However, these projects often raise concerns about debt dependency and potential political influence, which may threaten the sovereignty and economic stability of the recipient countries.

From the perspective of the V4 countries, given the need for territorial diversification, it would be valuable to define a clear pro-export strategy toward the Western Balkans, including support for foreign trade exchanges at both the ministerial and national agency levels. While we did not analyze the individual pro-export strategies of the V4 countries in detail, Slovakia, in particular, appears to lack a more specific strategic focus.

As this study complements existing research on the foreign trade of the V4 countries, it may serve as a basis for defining pro-export strategies at the national level or, regionally, through a V4 platform. Our findings highlight increasing trade exchanges, as well as high levels of trade intensity and trade complementarity, particularly with Serbia.

Although the index calculations indicate potential trade growth, the V4 countries still face regional competition, particularly from China, which has expanded its influence through Belt and Road Initiative investments and positioned itself in price-sensitive markets, as well as with traditional trade partners such as Germany, Italy, Russia, and neighboring countries. Future research will conduct a sectoral analysis to identify industries with the highest export growth potential, utilizing quantitative methods, including econometric modeling of tariff and non-tariff

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barriers, as well as regulatory impact assessments, to determine which trade-related constraints most significantly limit export volumes.

In conclusion, the Western Balkans represent a strategically important and economically promising region for all V4 countries. As the V4 seek to diversify their territorial trade structure, deeper engagement with the Western Balkans could create new opportunities for trade, investment, and broader regional cooperation. Gradual integration of the Western Balkans into the European Union, accompanied by continued reforms, may stimulate trade activity and foster a more stable business environment. Strengthened cooperation could also promote regional stability and mutual economic growth.

CRediT AUTHOR STATEMENT

Ľubica Zubaľová: conceptualization, investigation, supervision, writing – review & editing. **Kristína Drieniková:** investigation, writing – review & editing, project administration. **Nastasia Matúšová:** investigation, writing – original draft preparation.

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The Future of Geography: How Power and Politics in Space Will Change Our World

By Tim Marshall (Author) (Publisher: Elliott & Thompson 2023)

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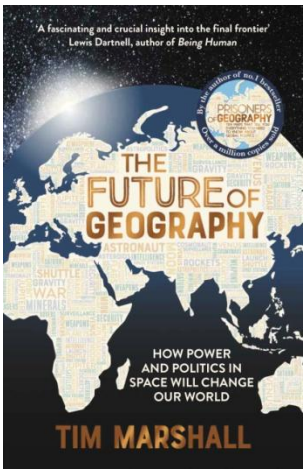
'A fascinating and crucial insight into the final frontier'
Lewis Dartnell, author of *Being Human*
PRISONERS OF GEOGRAPHY
THE FUTURE OF GEOGRAPHY
HOW POWER AND POLITICS IN SPACE WILL CHANGE OUR WORLD
TIM MARSHALL

It has been a long time since space ceased to be merely a trope of science fiction and emerged as a pressing domain of geopolitical analysis, termed "astropolitics." However, recent technological advances and the expanding civilian uses of space, along with the intensifying strategic rivalry among great powers on Earth, have rendered power projection in space an urgent matter once again. In "The Future of Geography," Tim Marshall explores space geopolitics with clarity and reminds readers that "we are now in the era of astropolitics. Nevertheless, what we have failed to establish so far is a set of universally agreed-upon rules to regulate this competition; without laws governing human activity in space, the stage is set for disagreements on an astronomical level" (p. 5).

From the very first pages, Marshall sets out to grasp the historical, political, military, and civilian dimensions of the space race. This issue will likely become increasingly relevant and pressing in the coming years, given China's rapid advancements in space technology and the concerns these have raised among Western powers, especially the United States. Overall, Marshall's hard-to-put-down book makes a valuable contribution to the literature on astropolitics by presenting a stimulating strategic vision of how military and civilian uses of space reverberate on Earth.

Structuring his book in three main parts, Marshall argues that the international norm that "space is a global common" is increasingly frayed due to intensifying geopolitical competition on Earth. The first chapter begins with a historical narrative charting humanity's evolving relationship with the stars. Marshall deliberately draws on examples from across civilizations, from ancient Greek and Roman to Chinese and Islamic traditions, as well as Renaissance Europe, to demonstrate how, since prehistoric times, different cultures have learned from one another in their engagement with the cosmos.

Ironically, Chapter Two suggests that a degree of similar collaboration could even be observed during the Cold War, when geopolitical rivalry and the ensuing arms race between the

two superpowers created conditions for technological breakthroughs and a non-negligible level of international regulation in space. However, this was primarily due to the threat of Mutually Assured Destruction (MAD). While engaging, one cannot help but question Marshall's somewhat romanticized view of the collaboration that the possibility of MAD generates. The first part is primarily descriptive, offering limited analytical depth regarding the power dynamics that underpinned the significant leap in space exploration during the Cold War era.

The second part, by contrast, is the most substantial section of the book, comprising six chapters through which readers come to understand *how*, more than *why*, astropolitics might become increasingly relevant to current geopolitics on Earth. Marshall begins Chapter Three by elaborating on the geographical features of space, its orbits, chokepoints, and resources, and explains complicated technical concepts such as satellite constellations and anti-satellite weapons with admirable clarity. The cost of this simplicity, however, is an under-theorization of power dynamics in astropolitics. Indeed, the book's theoretical position is at best ambiguous.

For instance, in Chapter Four, Marshall's recurrent emphasis on the lack of effective regulation in space-related issues as a major determinant of an imminent security dilemma is not embedded within any theoretical framework of International Relations, which limits the theoretical and conceptual rigor of the work. At times, Marshall appears to adopt a realist perspective, as in his remark that "in space it is not in the interests of the big powers to give up their advantage" (p. 77), a reference to the Artemis Accords (2020) led by the United States. Despite this vague theoretical underpinning, his critique of the existing legal frameworks governing space activities and his acknowledgment of the destabilizing effects of strategic competition in space suggest that further research on the key dynamics of astropolitics is still needed.

Fortunately, this theoretical ambiguity dissipates in the remaining chapters of the second part, where Marshall turns to a central theme in the astropolitics literature: space as a strategic domain. In these chapters, he examines the military doctrines, space programs, and technological investments of the Big Three powers—China, the United States, and Russia—as well as other major actors with lesser capabilities. This inclusive approach adds significant analytical depth to Marshall's main argument by presenting a comprehensive outline of global astropolitics.

Although his bold claims, such as that "China's space program is more militarized than that of any other state" (p. 109), require further supporting evidence, Marshall successfully engages with strategically critical issues, including the weaponization of space, dual-use satellite technologies, and their implications for geopolitics on Earth. He persuasively argues that the intensification of rivalry in space activities (particularly the continuation of geopolitical competition between China and the United States) is contributing to growing fragmentation among the Big Three, leaving little room for other countries except to align with one of the emerging space blocs. Marshall concludes the second part by identifying several potential factors that may hinder compromise between these major powers.

The final part of the book consists of two chapters. In Chapter Nine, Marshall speculates about a hypothetical space war, presenting two probable scenarios in which the Big Three might become entangled in conflict. While his discussion of the potential sources and dynamics of such disputes is based more on informed speculation than empirical analysis, he raises thought-

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provoking questions regarding controversial subjects such as the management of space debris and the extraction of extraterrestrial resources.

The last chapter, by contrast, shifts toward civilian uses of space, including space tourism and the colonization of other planets. When Marshall turns to the space activities of prominent private actors such as SpaceX and Blue Origin, an implicitly liberal perspective emerges, emphasizing human capacity for progress. However, he stops short of addressing ethical and normative questions regarding the potential inequities that could result from further space exploration. In closing, he returns to a realist perspective on national sovereignty, stating that "it is unlikely that we will recognize our common humanity and work together in space to harvest its riches and then distribute them equally" (p. 245).

Ultimately, with this book, Marshall draws necessary attention to an inconvenient truth: space warfare may no longer be as distant or hypothetical as once thought. However, "The Future of Geography" is not without its limitations. Readers seeking a substantial theoretical contribution may find the book underwhelming, as it offers limited engagement with current theoretical arguments in the field of astropolitics. This positions the book as more of a gateway text for advanced research on the militarization of space. Nevertheless, Marshall's admirable ability to present complex issues of space geopolitics in a clear and accessible manner makes "The Future of Geography" both a compelling contribution to the field of astropolitics and an engaging read for a broad audience.

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History, Disrupted: How Social Media and the World Wide Web Have Changed the Past

By Jason Steinhauer (Author) (Publisher: Palgrave Macmillan 2021)

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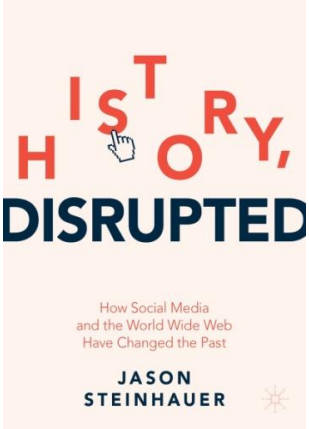

In international relations (IR), the past is never a neutral backdrop. Historical narratives function as tools for legitimation, instruments of soft power, and vehicles of strategic communication. Jason Steinhauer's "History, Disrupted" intervenes in this debate by turning attention to the digital platforms that now shape how history is encountered and consumed. His central insight is that the architecture of the internet—search engines, algorithms, and especially social media—rewards a form of "e-history" that often runs counter to the standards of professional historiography. What results is a version of the past that is accessible and emotionally compelling, yet fragile in its evidentiary foundations and easily repurposed for political ends.

Steinhauer identifies seven mechanisms that define this emerging "e-history universe": crowd-sourcing, nostalgia on demand, virality, storytelling, newsworthiness, narrative coherence, and what he calls "History.AI" (an algorithmically generated synthesis of the past). These mechanisms collectively privilege speed and emotional resonance over scholarly verification, thereby transforming both the production and the circulation of history online.

Some of the book's most effective chapters demonstrate how these dynamics unfold on specific platforms. For example, Wikipedia operates on the principle of "verifiability, not truth," a standard that often sidelines historians whose archival findings contradict dominant interpretations. Steinhauer highlights the case of Timothy Messer-Kruse, whose careful research on the Haymarket Riot was repeatedly rejected by editors because it conflicted with prevailing secondary sources. Another striking example is the 2016 "Snowzilla" blizzard: within hours, contributors had compiled a 5,300-word Wikipedia article with nearly 200 citations, effectively canonizing a local snowstorm as historically significant before the event had even concluded. These cases show how participatory speed and volume can elevate minor events into the historical record.

The discussion of blockchain technology is equally provocative. While blockchain promises archival permanence, Steinhauer points out that its immutability sits uneasily with the

historiographical principle of reinterpretation and revision. Once fixed in the ledger, a narrative may carry authority not because of its scholarly rigor, but because of its technological durability.

Although compelling, the empirical scope of the book is primarily focused on the US. The argument would be enriched by sustained attention to non-Western contexts—such as China's WeChat environment or the politics of digital censorship in Eastern Europe. Even so, the conceptual scaffolding is broad enough to apply to diverse information ecosystems.

For IR, Steinhauer's contribution lies in three key areas. First, the book advances the study of narrative authority by demonstrating how digital platforms are increasingly determining which versions of history appear credible to global audiences. States now contest the legitimacy of history not only in diplomatic forums but also through edit wars on Wikipedia or viral videos on TikTok. Estonia and India, among others, have recognized that online narratives shape their international standing as much as formal statements do.

Second, Steinhauer offers a useful typology for analyzing information operations in an era where virality often outweighs factual accuracy. The seven mechanisms he outlines offer IR scholars a framework for understanding how revisionist actors can exploit emotional engagement to erode consensus or justify territorial claims. In this sense, "History, Disrupted" speaks directly to ongoing debates about disinformation, legitimacy, and the politics of memory.

Third, the book foregrounds epistemic inequality. Algorithmic design, language hierarchies, and platform logics privilege certain voices while marginalizing others. Steinhauer's discussion of blockchain illustrates this: authority in these systems may accrue not to institutions with scholarly expertise, but to contributors who can post the most frequently. This dynamic parallels constructivist concerns in IR about norm entrepreneurs and knowledge hierarchies, where access and repetition often outweigh substantive authority.

The book succeeds in giving both a conceptual vocabulary and a set of illustrative cases that will resonate with IR scholars interested in media, legitimacy, and the politics of memory. The distinction that Steinhauer draws between "history," "the past," and "e-history" is particularly valuable, offering a set of terms that can be used across subfields. His chronological movement from Wikipedia through TikTok traces the digital evolution in a way that is clear, teachable, and analytically suggestive.

However, the book is not without its limitations. The empirical evidence relies heavily on illustrative anecdotes. While these examples are memorable, the absence of systematic content analysis—for instance, of widely circulated hashtags or viral YouTube searches—leaves open questions about scale and generalizability. A second limitation is the relatively brief treatment of historians who have successfully adapted to platform logics. Heather Cox Richardson's success on Substack is noted only briefly, when a fuller exploration could have demonstrated just how professional historians navigate the digital ecosystem rather than merely resist it.

Despite these caveats, this book is a significant contribution to the literature on digital politics and historical knowledge. For IR, the book offers both a warning and a set of conceptual tools: a warning that logics of virality increasingly shape the authority of history, and a toolkit for analyzing how these logics intersect with legitimacy, memory, and power. As states and non-state actors continue to weaponize the past in digital arenas, Steinhauer's analysis will remain relevant. For scholars, students, and practitioners alike, this book offers a timely starting point for understanding how history is contested in the digital age.

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How Democracies Die

By Steven Levitsky and Daniel Ziblat (Authors) (Publisher: Crown Publishing 2018)

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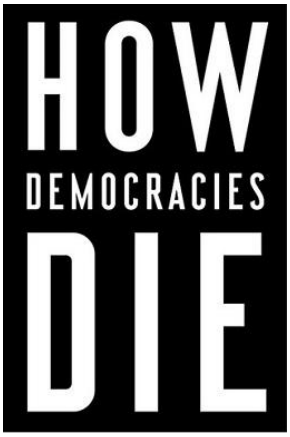

Steven Levitsky and Daniel Ziblatt begin their book with a crucial question: Is democracy in the United States at risk? They argue that today, democracies rarely collapse through violent coups or the imposition of martial law by non-democratic forces. Instead, populist leaders who weaken democratic institutions and manipulate public emotions play a major role in eroding democracy from within. The authors note that Donald Trump's 2016 election reflects broader global trends observed in countries such as Venezuela, Hungary, and Turkey. Populists often exploit democratic processes to gain power and then undermine democracy from the inside, viewing themselves as superior to democratic institutions.

They also examine the subtle and gradual ways in which modern democracies deteriorate over time. Typically, populist leaders make promises to take actions they are not authorized to carry out without democratic approval.

The book provides a framework for understanding internal threats to democracy, interpreting Trump's election as a symptom of democratic decline rather than its cause. Fateful alliances are highlighted in this chapter as a key factor in the collapse of democracies, where decisions by political elites to support authoritarian outsiders play a crucial role. The chapter examines how powerful outsiders have frequently ascended to power with the support of established political figures. This dynamic can benefit either side, although the public may ultimately bear the brunt of the cost. Levitsky and Ziblatt cite several examples of democratic elites underestimating authoritarian leaders: in the 1920s, Italian liberal politicians brought Benito Mussolini into the government to quell unrest; in the 1930s, German conservatives invited Adolf Hitler to power, believing they could control him; and in the 1990s, Venezuelan President Rafael Caldera inadvertently paved the way for authoritarian rule by Hugo Chávez (p. 22). These instances demonstrate how political elites, by ignoring early warning signs for short-term political gain, contributed to the eventual decline of democracy, with lasting consequences for society (Crouch 2020).

In discussing "Gatekeeping in America," the authors describe how political parties have historically acted as "gatekeepers." Through closed-door negotiations, they once prevented demagogues and extremists from advancing their agendas. However, after the late 1970s, primary elections shifted power to the public, allowing voters to choose candidates directly. While this reform increased participation and transparency, it also weakened party control, making it easier for populists and celebrities—like Donald Trump—to bypass traditional screening processes. As illustrated in the book, backroom deals and politically engineered nominations had once enabled party elites to block fringe candidates (p. 29). With the rise of mass media and social networks, populists now communicate directly with the public, sidestepping traditional party mechanisms. Despite initial resistance from party leaders, Levitsky and Ziblatt argue that this shift paved the way for populist outsiders like Trump, whose celebrity status and divisive rhetoric helped him secure the Republican nomination in 2016 (Rubsamen 2020).

"The Great Republican Abdication" explains how the Republican Party failed to prevent Trump from winning. Most Republican leaders recognized and ultimately supported him despite his repeated violations of democratic norms. He quickly became highly influential within the party. Levitsky and Ziblatt compare this dynamic to the failures of European conservative elites during the rise of fascism. This "abdication of responsibility" echoes earlier elite mistakes, when conservatives underestimated autocratic leaders (p. 69). Major party figures prioritized electoral victory and partisan prejudice over defending democratic institutions once Trump secured the nomination. The authors argue that democratic backsliding often results more from elite complicity or silence than from a lack of popular will. They contend that the decline of American democracy accelerated due to this failure to uphold democratic values.

"Subverting Democracy" details how modern autocrats have shifted their strategies—from suspending constitutions or launching coups to using democratic institutions themselves to suppress opposition and consolidate power. The primary tactics of this "legal authoritarianism" include manipulating the media, politicizing the legal system and police, engaging in political witch hunts, packing courts, and exploiting state authority to target opponents (p. 89). Authoritarian leaders such as Erdoğan in Turkey, Orbán in Hungary, and Chávez in Venezuela have all employed these methods. The authors note that elected autocrats often erode democracy gradually, using laws and public justifications to disguise their anti-democratic actions (Barroso 2021). By manipulating regulatory bodies and law enforcement for personal gain, they neutralize opposition while maintaining a façade of democracy.

"The Guardrails of Democracy" outlines two main informal norms essential to a functioning democracy: "institutional forbearance" and "mutual tolerance." These norms extend beyond formal institutions such as the judiciary or the constitution. Mutual tolerance involves viewing political rivals not as existential enemies but as legitimate opponents (p. 104). Institutional forbearance means refraining from exploiting legal technicalities for partisan advantage. These principles foster a political culture of negotiation and compromise. When either norm breaks down, politics becomes a zero-sum contest, exposing democracy to manipulation and authoritarianism. Even while operating within the law, both executives and legislatures can erode democracy, as seen in Venezuela, Argentina, Paraguay, and Ecuador (Holgado and Urribarri 2024).

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In "The Unwritten Rules of American Politics," the authors examine how key democratic norms have eroded in the United States, mainly due to rising inequality and polarization. The Republican Party—and, to some extent, both major parties—has increasingly violated traditional standards as political division deepens (Nair et al. 2025). The authors demonstrate how established conventions have eroded due to the excessive use of the filibuster, disregard for Supreme Court nomination protocols, and deliberate obstruction of government functions (p. 104). What were once extraordinary actions have become normalized, weakening public trust and undermining the informal principles that long sustained American democracy.

In "The Unraveling," Levitsky and Ziblatt emphasize that personality, ethnicity, and cultural identity have become the foundation of political division in the United States, extending beyond policy disagreements. As polarization deepens, parties increasingly see each other as mortal enemies, making compromise nearly impossible (p. 104). Political conflicts have evolved into existential struggles driven by ideological extremism, demographic anxieties among white rural voters, and backlash against civil rights movements (Berlet and Sunshine 2019). As political opponents are portrayed as threats, parties become more racially and culturally homogenous, undermining mutual toleration and democratic legitimacy.

"Trump Against the Guardrails" examines Donald Trump's presidency as a stress test for American democracy. His time in office challenged many of the nation's democratic safeguards. While some institutions—such as the courts and federal agencies—pushed back, the long-term damage to public confidence and institutional legitimacy remains significant. Levitsky and Ziblatt highlight numerous examples of Trump breaching democratic norms: attacking the press, delegitimizing the judiciary, questioning electoral integrity, and inciting political violence. Although some checks held firm, the authors argue that the harm to democratic culture and trust is profound and lasting (p. 164).

In the final chapter, "Saving Democracy," the authors move from diagnosis to prescription. They argue that preserving democracy requires more than legal reforms—it demands civic and cultural renewal. Their recommendations include forming cross-party coalitions to isolate extremists, reforming electoral laws to protect voting rights and reduce gerrymandering, and investing in civic education to foster respect for democratic principles. They also emphasize the importance of bridging racial and cultural divides through inclusive narratives. Ultimately, they contend that democracy depends not only on institutions but on citizens and leaders committed to democratic ideals and willing to defend them (p. 192). The authors conclude that democracy cannot sustain itself automatically; US democracy remains vulnerable to collapse, its stability undermined by polarization and the erosion of shared norms (Levitsky and Ziblatt 2024).

"How Democracies Die" offers readers a clear understanding of "mutual toleration" and "institutional forbearance," explaining why these norms are vital to the survival of democracy. Through numerous case studies—from Mussolini's rise in Italy to Chávez's rule in Venezuela—the book shows how democratic breakdowns recur across time and place. Levitsky and Ziblatt write in an accessible yet scholarly style, making complex political science engaging for a broad audience. Their warnings are especially timely as populist leaders and societal divisions threaten democratic values, particularly in the United States. They urge politicians and citizens alike to strengthen democratic norms and work across party lines.

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While the book's insights are profound, it leans too heavily on US examples and underrepresents similar global challenges, limiting its broader applicability. It also overlooks the role of digital media, social networks, and algorithmic echo chambers that complicate the defense of democratic values. Although the historical examples are illuminating, they sometimes obscure emerging risks that differ from past patterns. Furthermore, while the authors briefly mention socioeconomic inequality as a driver of polarization, they could have explored more deeply how economic disruption and demographic change beyond race strain democracy. Finally, the absence of a discussion on gender dynamics misses an opportunity to examine how women's political participation and diverse leadership styles could strengthen democratic resilience.

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